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**ABSTRACT**

The document contains edited versions of sessions from the 1981 Special Study Institute, the fourth in a series designed initially for state education consultants for the visually handicapped. Objectives of the 1981 Institute are listed--to establish coordination, communication, and cooperation among teacher trainers; to develop interagency coordination skills; and to develop a regional plan for improving educational programs for visually handicapped students within that region. Following an introductory section, section 2 contains papers titled "Special Education Legislation" (J. Ballard), "Categorical Legislation (I. Schloss), "State Funding Perspective" (W. Wilkin), and "From the Legislator's Point of View" (C. Kinsey). Responses from J. Hazekamp, H. Pace, R. Silberman, and J. Todd are offered. A third section on creative options for quality service delivery covers presentations titled "Tapping into Volunteerism" (S. McCurley), "Tapping the Private Sector" (I. Bord), and "Professionals' Responsibility for Advocacy" (S. Negrin). Seven papers in a fourth section include: "The Specialist Approach" (J. Hazekamp), "The 'Generalist' Consultant" (D. Livingston-White), "The Commission Approach" (L. Young), "Maximizing the IRC's--Instructional Resource Centers" (J. Todd), "Power of Parents" (L. Robinson), "Interagency Cooperation" (S. Spungin), and "State Strategies" (P. Williams, Jr.). A final section contains five major suggestions for becoming politicaly involved, including getting members for the coalition and getting parents and clients, as well as professional paid workers, involved in the political process. Appendixes contain a list of Institute participants and a chart with national and regional programs outlining specific objectives, activities, a time line, resources needs, and evaluation methods. (SW)

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# COOPERATION FOR QUALITY SERVICES IN A PERIOD OF DECLINING RESOURCES

## INSTITUTE REPORT

GERALDINE T. SCHOLL, EDITOR

SPECIAL EDUCATION PROGRAM
SCHOOL OF EDUCATION
THE UNIVERSITY OF MICHIGAN
ANN ARBOR, MICHIGAN
1982

EC150398

# Cooperation for Quality Services in a Period of Declining Resources

## Institute Report

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Ann Arbor, Michigan

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# I

# Introduction

This Special Study Institute was the fourth in a series designed initially for state education consultants for the visually handicapped and sponsored by the University of Michigan with funding from the Bureau of Education for the Handicapped, now Special Education Programs. Every state has been represented in at least one institute in addition to Washington, D.C., Guam, and Puerto Rico and Canada. (See Appendix A).

The 1979 Institute focused on change as it relates to the role of the state vision consultant. Changes in society, education and special education were reviewed. Methods of meeting the challenge of change were discussed and participants developed their personal plans for coping with change.

The 1980 Institute reviewed the process and procedures for the formulation of professional development plans for each state. Because of the key role of institutions of higher education in this process, some faculty from those colleges and universities with teacher preparation programs in the visually handicapped were also invited to attend. Participants discussed (1) methods for conducting needs assessments, (2) procedures for maximizing the potential for using monitoring as a means of program improvement, and (3) inservice training models. The outcome was a professional development plan for each state drawing particularly on the resources of the colleges/universities in that geographical area.

The 1981 Institute was designed to meet two objectives: (1) establish coordination, communication and cooperation with teacher trainers through a joint meeting, and (2) develop interagency coordination skills. The list of participants was expanded to include not only college/university faculty but also residential school superintendents. A number of instructional resource personnel and supervisors of large city programs for the visually handicapped also attended at their own expense. Participants met in groups and developed plans for cooperation on a regional basis. The HEW regions were used for forming the groups. This was an historic Institute because it was the first time these three groups of professionals had an opportunity to sit down together and discuss mutual issues related to the education of visually handicapped pupils on a national level and more specifically in their regions.

Although the original proposal for these Institutes was designed specifically for state vision consultants, as noted above, it became evident that close cooperation of these professionals with college/university and residential school personnel is essential for developing quality programs at the local level for visually handicapped pupils.

Hence, the 1981 Institute which was scheduled in include college/university personnel was expanded, with additional funds, to include residential school superintendents. As noted above, participants developed plans for regional cooperation. With the valuable contribution of the instructional resource center personnel and a few supervisors of large city programs, all of whom attended at their own expense, it again was evident that these groups should also be included: the Association of Instructional Resource Centers for the Visually Handicapped and the Supervisors of large city programs. Thus, the 1982 Institute included five groups of leadership personnel. A list of participants is included in Appendix B.

The objectives for this Institute were of necessity revised to reflect the expanded groups of participants. The specific objectives were to:

(1) establish coordination, communication and cooperation among the groups;

(2) develop interagency coordination skills;

(3) develop a regional plan for improving educational programs for visually handicapped pupils within that region.

Since the 1981 Special Study Institute, major changes have taken place at all levels: national, state, and local, particularly on the political front. We are in a period of declining financial resources, deteriorating public opinion relative to education in general and special education in particular. Hence, for this Special Study Institute we selected the theme: "Cooperation for Quality Services in a Period of Declining Resources." The program was designed to identify the major problem areas at the federal level in order to form a realistic base on which to formulate plans and strategies to meet the challenges. The program included speakers, panel presentations and regional discussion or workshop sessions. A copy of the program is found in Appendix C. A notebook of materials relevant to the institute sessions was sent to each participant in advance of the Institute.

The planning committee for this Institute included two officers of the three organizations: SECVH, CEARSVH, and AIRC/VH, and two C/U faculty.

A special strength of this Institute was the involvement of the staff members from the American Foundation for the Blind. During the 1981-82 year it became increasingly evident that we are moving from the "ask and you shall receive" era in our relationship with the federal government to the "seek and you shall find" era. Federal funds are being drastically reduced and it is highly unlikely that we will receive federal monies for continuing these institutes. Since it seemed extremely unfortunate to drop these annual professional development Institutes for leadership personnel in our field, we turned to the American Foundation for the Blind as the logical agency to assume a leadership role for continuing the Institutes.

AFB is our largest national agency; they have numerous resources and they are in the process of strengthening their own regional structure in order to be of greater service to the field. Because AFB has not been involved to a very great extent in the education arena for the past few years, we as educators have not used this resource as fully as we probably could.

We asked that the six AFB regional consultants be included among the Institute participants and that they assist in the regional discussions in anticipation of their functioning as a focal point for carrying out any plans. These regional consultants have many skills and are trained in many ways that educators are not. They are skilled in managing and facilitating resources; personnel, both lay and professional; and planning and conducting meetings. They are very accustomed to finding and using appropriate resources. Their attitude toward the use of outside resources may be somewhat different than in education. In general, educators seem to view going outside the educational system as a sign of weakness either within themselves or within the system. The opposite point of view is taken by other disciplines, especially social work, and the regional consultants view identifying resources as a special strength. They are happy to mobilize other resources in order to get the job done.

During the discussion sessions, participants formulated an IEP for improving services to visually handicapped pupils in their regions. In addition, each regional group appointed a representative to work on a national IEP. Copies of these are included in Appendix D. It is not possible at the time of this writing to determine the results of those efforts.

The remainder of this report includes the edited version of the various sessions.

## II

## The Realities of the Future

### Introduction

To set the stage for the Institute, a series of presentations were made to assess the current status of special education legislation, categorical legislation, and state funding. The final paper is a view from a legislative staff person on the future of legislation for special education. Following the three presentations, a spokesperson from each of the four leadership groups responded from the perspective of their respective groups.

### SPECIAL EDUCATION LEGISLATION

Joseph Ballard

Council for Exceptional Children

During the two year period after the implementation of P.L. 94-142, the Education for All Handicapped Children Act of 1975, the Congress engaged in unusually thorough and extensive oversight hearings on the act and its implementation in conjunction with state and local policy across the country. It had been our plan at CEC that, given this extensive survey and the fact that as we entered 1981 we would be nearing three, four, and five years with P.L. 94-142, we would engage in a thoughtful review of the federal commitment and its working relationship with state and local policy and practice. The review would focus on issues, such as, related services, the involvement of other public agencies, the role of private schools, and the Individualized Education Program (IEP) in a restrained and constructive way. But a new Congress came to town.

Before reviewing the impact of this change, let me emphasize that although CEC, as an organization, may have problems with proposals coming from a particular administration, this does not necessarily mean we are opposed to that administration; it simply means that in the specific area of special education, we as an organization, are unable to agree with three basic proposals made in 1981 and reiterated in 1982. This tripart package for exceptional children and their education, simply stated as "Cut, Gut, and Block," was recommended to the Congress of the United States in February 1981. During the next year that package was reviewed by the Congress and it recommended to the administration (1) a 26 to 30 percent cut in the existing appropriation under P.L. 94-142; (2) outright repeal of P.L. 94-142 and (3) combine the two largest programs in elementary and secondary education, that is, economically disadvantaged and handicapped into a block. The response from the field was to mobilize one of the most dramatic, most thorough, and most resounding lobbies to protect the federal minimum commitment and the basic appropriation for P.L. 94-142 and to say "no" to the block grant. The result was that Congress, though they made many budget cuts, some very painful and some in areas that effect all of us directly, chose not to make a major cut in the appropriation for special education in the overall program of P.L. 94-142.

The next question was what recommendations will the administration bring back in the following year. Unfortunately, the tripart recommendations of February of 1981 were repeated in essentially the same package in February of 1982: to wit, first, a 30 percent budget cut, which for Public Law 94-142 means $931 million down to $672 million; and for P.L. 89-313, from $165 million in 1980 to $116 million; for personnel development, from $58 million, down almost 50 percent to a possible low of $23.6 million. And for all those other programs run by the old BEH, now Special Education Programs, down from $125 million where it had stabilized for a number of years to about $74 million for the coming school year. These are the budgetary recommendations as of February 1982 and they look a lot like the recommendations of February 1981.

Secondly, they call for major reduction of restrictive provisions in P.L. 94-142. It is appropriate at this point to mention a very remarkable occurrence a few days before the official Reagan budget was out this year. A letter was transmitted from the Congress to the President of the United States, signed by 285 members of the House, Democrat and Republican, and 59 members of the United States Senate. That letter said in essence: "Dear Mr. President, We believe in the essential ingredients of the public policy base established in special education in 1975; we think we made it clear last year that we do not want to make major cuts in this area; and we'd like to make it clear this year that we hope it will not even be recommended." We owe a great note of gratitude to all the congressional staff who have shown rare competence and rare dedication to special education on the Hill in a very troubling time. That letter began as a "Dear Colleague," as it's called in the trade, sent from certain key members of the House and Senate to all other colleagues in the House and Senate requesting that they sign the letter to the President; and they did in very remarkable numbers.

Thirdly, we now have a new block grant proposal, not the same one as last year. There are three ways to block: one is to simply take the biggest programs and put them together because they have the most money; the second, to take all the smaller programs and block those; and third, take like programs and put them together in a block. We can illustrate this procedure through the administration recommendation itself. It would put P.L. 94-142, the P.L. 89-313 program, and the preschool incentive program, not a big pot of money but an important program in the estimation of a lot of people, together in a block. This would provide maximum flexibility for the states and localities to use as they see fit but with a somewhat reduced price tag. By the way, you may be watching the course of the education block grant program that is in place now. Many of us argue they are not very good for developing a constituency to fight for appropriations. In the first year under this education block grant about a third of monies authorized by the Congress will be appropriated. Where is the lobby for a block grant? From state to state money is used in so many different ways that it is difficult to develop an effective lobby.

In brief then, the triple package of last year has returned this year in no dramatically different way. However, an optimistic note: The Congress of the United States was able to stand up on this issue as it did on some others despite the full weight of the economic recovery.

In closing, I would like to alert you to the regulatory developments going on at this same time relative to P.L. 94-142. In May, there are tentatively scheduled hearings and an opportunity to testify in the District of Columbia; Portland, Maine; Atlanta, Georgia; Chicago, San Francisco and Dallas. Many of you may want to take advantage of the opportunity to express yourself on what reasonable, sane and useful regulatory changes should now occur. I wish I could take out my crystal ball and predict how that will all work out; I am unsure. We as an organization have been pleased with the opportunity for the membership of CEC to have input at least to the level of the Office of Special Education and Rehabilitative Services within the Department of Education. Whether matters may go beyond there, we cannot be sure.

A couple of final thoughts: First, please continue to help as individual citizens, to educate the Congress. They can be educated; they learn well and they learn fast if you give them the information they need; support them when they do the right thing because they do, many times. Secondly, join in encouraging this particular administration to start talking about constructive improvements and refinements of the status quo. And finally, be very wary in these times of saying to yourself: "Gee, it did not turn out so bad because it could have been a lot worse." This attitude could kill us. Under the original authority for P.L. 94-142, we should now have actual appropriations of $300 billion. There is reason to be optimistic, however. There are a lot of pain and a lot of suffering; there are very good programs and very good initiatives in a number of areas. The secret to success is to develop an absolute passion towards the achievement of a modest objective. As long as we keep our passion toward achieving our objective, we will come through these years recognizable.

## CATEGORICAL LEGISLATION

Irving Schloss

American Foundation for the Blind

I would like to advise you of the risks that we face in the years ahead relative to categorical legislation, that is, legislation which creates programs, targeted on the special needs of specific population groups. Categorical legislation is far from dead in the closing days of this first session of the current Congress. We are caught in two currents: the need for fiscal constraint to deal with the problems of inflation and the high interest rates which began during the last years of the Carter administration; and the current administration's philosophy which believes in literally dismantling the federal government.

The fiscal 1983 budget is predicated on proposed legislation. One of the current major proposals is the so-called swap, whereby the federal government would assume all of the state's obligations for Medicaid and in turn, the states would take on food stamps and the total cost of the AFDC program. A second proposal is the turnback portion of the new federalism which involves turning back some 43 programs to the states over the next 10 years. These 43 programs include most of those which were consolidated into block grants and range from vocational rehabilitation to urban mass transit assistance and some additional health programs. Fortunately special education seems to be spared from turnback to the states and is in a category of national priorities. Under the turnback legislative proposal for the four fiscal years beginning in 1984 through 1987, the excise taxes on alcohol, tobacco, telephone service, gasoline, and a portion of the windfall profits tax would be set aside in a trust fund of some $28 billion dollars, to be distributed to each state to finance the turnback programs on a formula based on what the states received for the different categorical programs between fiscal years 1979 and 1981. For the succeeding four years, fiscal years 1988-1991, these federal portions would be phased out altogether at the rate of 25 percent a year and the states would then impose their own excise taxes to finance these programs. During the first four year period it would be purely optional for the states to take on these programs with money from this trust fund; if they choose not to take on the programs, they would still get their share as superrevenue sharing funds to do with whatever they please.

To illustrate how this may work after 1991, let us look at some states. Utah is not apt to have too much income from alcohol and tobacco excise taxes and there are many southern states in the same category; some 23 states have oil capability but five states produce 80 percent of the oil. How are states going to raise money for the turnback programs in the absence of excise taxes and windfall profits taxes?

It is an uphill fight but this year we have stronger allies than we had last year. Last year the governors wanted block grants very badly: they wanted flexibility. However, they did not expect to take on the programs through the block grant mechanism with rather substantial cuts. Thus, the states are increasingly faced with a difficult financial burden and the National Governors Association is concerned and expressing opposition to the new federalism. There are indications that as a result of both the swap and the turnback legislation, the states in fiscal year 1984 would be faced with an additional $9 billion burden. It is doubtful whether the states are prepared to increase income and sales taxes to meet these obligations or whether a lot of people will suffer. So far in this administration the cuts are largely targeted on the most vulnerable part of the population: the handicapped, children in general, and disadvantaged children in particular, and the elderly. For example the proposal for rehabilitation services for fiscal year 1983 is for $623.5 million and that represents a cut from the fiscal year 1982 appropriation of some $340 million.

We do have some very good friends on a bipartisan basis ranging from liberal to conservative on both sides of the Hill, the Senate and the House of Representatives. We must persist in our efforts to educate those members of Congress. If we do, and we must, perhaps we can save the programs that we are concerned with. Visit your congressmen when they are home in your district; write to them regularly and explain the specific needs and what cuts would mean in that congressman's district.

In closing, I would like to mention that Mr. David Stockman, the Director of the Office of Management and Budget, in his interview which appeared in the December issue of The Atlantic Magazine, made a very interesting statement. Mr. Stockman said none of us really understands what is going on with all these numbers. I think he was describing the situation very authoritatively.

## STATE FUNDING PERSPECTIVE

William Wilkin
Former Executive Director
National Association of State Boards of Education

There is a general consensus that the prospects for increased funding for special education programs is not good. At the federal level, several factors may help protect gains. First of all, a coalition in Congress that runs the gamut from very conservative to quite liberal is a tremendous advantage. Second, Congress is being reapportioned; there has been a pronounced movement of population in most states to the suburbs, where your interests draw their greatest strength, rather than in big cities, where some of your strongest competitors for federal dollars are. That shift probably will augur well in the coming years at the federal level.

On the other side, there are issues at the federal level that require attention and must be factored into long run plans for a total funding strategy. There has been a remarkable recent development: the Political Action Committee. Particularly since the mid-1970's the amount of money flowing out of political action campaigns, which are heavily dependent on money, have grown enormously. The amount of money that is handed out through political action committee donations today to political candidates in Washington far exceeds the combined budgets of all of the major educational lobbying organizations. We are having increasing difficulty competing on the media battlefield because that battlefield depends on money, not bodies. Senate races and presidential races need money. Foot soldiers may help in the House of Representatives but they do not count much in other national races. This fact must be kept in mind as you decide where you can best protect your interests (local, state or federal level) in the future. There are very important changes in the whole general political structure in Washington that must be considered in any planning.

Let us turn a moment to the local level. Signs there too are not very good. While there is some evidence that the worst of the proposition mania is past, the shock waves remain and will continue to condition the thinking of people who are asked to levy property taxes. In short, the general prospects for raising revenues at the local level are not enormously positive and the situation is worsened by several other factors. In areas where school districts are fiscally dependent, that is, the school district does not have independent revenue raising capability but must depend on a county council or city council to approve a tax rate, you must deal with mayors and county executives who are most impacted by the contraction in the federal domestic grants. As federal money for sewer development (or whatever else is near and dear to mayors and county councils) is cut back, there will inevitably be roll-out effects on the amount of money available at the local level for education, particularly in a community where property taxes are constrained.

Within the school sector itself, it is important to recognize at the local level that there has been a real power shift. Until the mid-1970's, local school administrators, particularly superintendents, ran big programs like kings. Something has happened at the local level: the resurgence of school boards and their changed nature is resulting in a major power shift. Increasingly, power is moving out of the hands of administrators into the hands of the elected policy makers. That means that you have a harder job in selling your case because rather than convincing another professional educator of the worth of whatever you want, you must convince 6, 8, or 10 elected citizens who may or may not know very much about what is near and dear to your heart. In fact, increasingly at the local level, school board politics are characterized by special interest politics and a set of special interests on a local school board who view your cause as anathama will not be very cooperative. But we should not be totally negative toward local school boards: they face tremendous difficulties. Like education in general, they are finding it increasingly difficult to muster general public support for increased spending for education. It is not just the limits on property taxes but it is other conditions as well. For example, compute the change from 1970 to 1980's the number of children per household in your local community and you will find even in the suburbs there has been a tremendous reduction in the number of children per household. It is not so much that the number of children has changed but the whole household structure and in turn the underlying political structure are changing. That is going to make the job increasingly difficult.

One last factor is that school boards all over the country are under tremendous pressure to do something about teacher salaries. Teacher salaries in real terms have at best held their own and in most communities have in fact dropped dramatically over the last decade. Teachers as a group have done among the poorest in growth of real wages. That pressure means that local school boards need and want increased flexibility in bargaining and categorical money is undesirable because it ties up dollars. They have to employ bodies rather than spreading the goodies around in terms of increased pay. This factor is coloring how local school boards view you dramatically all over the country. Watch where local and state school board associations are putting their dollars. When they go to the legislature, they say free us from categorical constraints.

Now let us move to the state level which still remains and ought to be where you must place your central focus and should expend your greatest effort because it is the place where you get the lion's share of your money. State support far outweighs either local or federal support for special education. At the state level things do not bode well either. First of all, there is a marked changing of the guard in the people who sit in state legislatures around the country. The people who sat in state legislatures for the most part when either P.L. 94-142 or state counterparts were enacted are more and more leaving the scene. They are tired; they are fed up; they feel they have done their term and they are moving on to other things. Those coming in to replace them know very little about the legislation that you fought to pass in the early and mid-70's. They have no vested interest in it; their name is not on the bill. Thus, one of your major tasks has to be educating a new generation of politicians and state houses.

Secondly, there is increasing muscle-flexing on the part of the nation's governors. In the last several years they have had their egos bruised, because these upstarts, called state legislatures (that people 20 years ago were talking seriously about putting out of business and writing out of state constitutions,) began to usurp from the executive viewpoint many powers and prerogatives that were once exclusively the domain of governors. Governors are fighting back and they are in many states an increasingly powerful force, a force which in some respects will be very different than was present five or six years ago. While state taxes went up last year nationally, state budgets for the most part are financially in trouble. Some states are running billion dollar deficits; others, after throwing almost everyting overboard, still find themselves sinking. There are, in short, serious financial problems. In an effort to cut property taxes in the late 1970's and the effort to respond to or to head off Proposition 13 pressures, a lot of state legislatures gave away the store financially.

The same kind of pressure that is on local school boards to do something about teacher salaries is also on state legislatures. Within the last year or two, there has been a growing number of measures enacted in state legislatures which in effect either seriously weaken state categorical funding legislation, or cut it back, or block. Several states have already passed their own education block grants and more are on the way because when it comes to state legislatures and the kind of leg power as opposed to dollar power that is required to win legislative campaigns, teachers are going to beat you to the punch every time when it comes to organizing interests.

Finally, there also in state legislatures is a feeling that you have had your turn. In most states any increase in nominal education spending from 1975 to 1980 in state aid was made up disproportionately of state funding for special education. There is a feeling now among many state legislatures that it is time to turn attention to other needs. There is growing pressure to go "back to the basics" and there is enormous pressure to do something about the preparation that students receive generally in the areas of science and technology. Within the next couple of years, you will see a tremendous pressure in a lot of state capitals and even here in Washington for a major effort and direction of funding to that area. Further, at the state level a lot of legislators are tired of dealing with the problems created by the lunatic fringe in the special education community. I am not talking about 98 percent of the wishes and demands; I am talking about episodes which get national publicity, such as, people demanding air conditioning of whole schools when one room would suffice. That kind of thing is creating tremendous problems and unfortunately every political movement in the long term tends to suffer from its radicals.

Now what can you do about all of this? First, you have to, in the next decade, broaden your political agenda. You must look at more than simply your own immediate concerns, however important they are. There are major changes underway that in the final analysis are going to have a tremendous impact on where you go in the next decade. In particular, you have to look at a number of things. You should watch like a hawk at the federal level for changes that may be underway which will seriously erode the revenue base for education at the state/local level. There will be serious talk no doubt in the next year or two about the enactment of a value added tax as a means of increasing federal revenues. That will in effect do the same thing that the federal personal income tax has done to the ability of states to raise money in the area of personal income taxes. It will have an enormously detrimental effect on state revenue raising capability. Similarly some of the excise tax schemes that are currently proposed are in fact nuisance taxes at the federal level. It is precisely from nuisance taxes that most state legislatures raise a lot of money. If the federal government gets into the act any deeper than it is already, that will inevitably have detrimental effects for your largest, most important funding base.

You must find ways in coalition with other organizations to deal with the problem of teacher salaries. Last fall in Sacramento I watched representatives of the California Teachers Association and then one parade after another of various interest groups from the special education community fighting one another over regulations and the revision of regulations in the state bylaws on special education. I can tell you when it comes to what is happening in the legislature, the teachers have already won and you must figure out some way to relieve their wage pressure on your programs. You cannot afford to have organized teachers as your political enemy and that is increasingly what is happening. I suggest that at this point in time you forego some bodies as a tradeoff for getting increased wages.

As I indicated a while ago, you must pay attention increasingly to two sets of policy makers: local school boards and governors, and do not neglect state legislatures. Having watched successful and unsuccessful efforts to get things out of those people, I suggest you deal with them out of the legislative season and in a low key manner. Pushing armies of wheelchairs into state houses is not going to work anymore. In fact, it is going to work against you.

I would look very carefully and as openly as possible at some of the proposals about swaps of services. Over the long run the realities are that you are fighting a losing game in trying to squeeze education money out of Washington and that is largely due to this phenomenon called political action committees. You do not have the resources that national politicians want and need to stay in office.

There are some other practical things that you can do. You have got to figure out some way to eliminate the unintended effect of P.L. 94-142 that results in the education community getting increasingly saddled with the cost of providing non-education related services. The related service clause over the long haul is going to do more damage than good to your programs. No one intended it to be that way but that is what is happening. You must figure out some ways of forcing the health and welfare agencies to shoulder a fair share of their burden. Lastly, you must do something about establishing the credibility of the 98 percent of you who have your heads screwed on right as against those few who are doing bizarre things in the name of promoting better educational opportunities for handicapped kids. Those folks are killing you and I think that until you can reestablish some kind of credibility, those folks are going to make it harder and harder for you in a time of tight resources to get what you want.

## FROM THE LEGISLATOR'S POINT OF VIEW

Cheryl Kinsey

House Select Education Subcommittee

I have been asked to provide you with some of my insight into what the future may hold in the way of legislation for special education and to suggest to you ways in which you, as leadership personnel in the area of visually handicapped, might influence the course of education policy for children with special needs in the years ahead. I think it is important that we not put the "cart before the horse". Let us first examine the present Administration's policy in the broad sense and then it will be easier to understand how you fit into the total picture.

For the first time since 1954, Washington has a Republican President and a Republican Senate. What President Reagan and this new conservative majority mean for health services, education and the rest of the country is --- a return to a more conservative outlook. In essence, as emphasized in his campaign statements and the Republican Party Platform, President Reagan wants to decentralize power in all human services programs and give more control back to state and local governments.

If it makes sense to "deregulate" the trucking and airline industries, the President reasons, it should also make sense to "deregulate" these other human services programs. In the general sense, Republicans have expressed concern that over the past 15 years, the Democratic Congress has launched one new program after another and built a huge bureaucracy in Washington to carry out the plans. Like puppets on a string, they say, states have been pulled by regulations, guidelines and the promise of federal grants.

The result of all of this, the Administration feels, has been a loss of local and community control over programs that directly affect them. They continue to point to the Departments of Energy and Education and say --- "We have no more oil or learning to show for it." The bottom line appears to be: "Government is the problem, and not part of the solution." Whether we agree with it or not, the philosophy of this Administration is at least clear: less power, money and regulation coming from Washington and more state and local control over all human services programs.

The rationale for this "Master Plan" is based on the assumption that the federal government's delivery system has experienced a serious overload and is no longer able to effectively and efficiently serve the American people. The Administration feels that the "Plan" will:

1) Permit greater efficiency and effectiveness in service delivery,
2) Enable better targeting in the face of shrinking resources,
3) Enable greater accountability and fewer mistakes, and
4) Permit greater innovation and development.

Specifically, then, one of the means the Administration has chosen to achieve this "decentralization" in education is a politically-charged form of revenue-sharing called the "block grant." This tool, which its supporters see as a means to achieve greater effectiveness and efficiency in the delivery of federal funds, is thought by many to be a "subterfuge" for other purposes --- namely, budget cuts and a transfer of responsibility to the states.

Block grants, however, are not the "new kids on the block." They go as far back as the Johnson Administration with the enactment of the Partnership for Health and Safe Streets Act. Later, during the Nixon presidency, the Comprehensive Employment and Training Act (CETA) and the Housing and Community Development Acts were passed. And finally, a product of the Ford Administration was the Title XX Amendments to the Social Security Act. Over time, though, restrictions and guidelines were usually added to these block grants or they were let shrink in real dollars and their new money, ideas and regulations were placed into new categorical grants planted to surround the existing blocks.

Two striking differences exist between past attempts to create block grants and those of the Reagan Administration. In the past, block grants were tied to specific interests and accompanied by higher appropriations. This time, however, the Administration has not only proposed consolidation of programs but they have imposed significant reductions in funding. Further, in light of the need for additional cuts in 1984 and 1985, we may see a total phase-out of federal government support for block grant programs in the future.

It is not surprising then, that many people feel "block grants" have been designed to --- SHIFT the burden, and SHAFT the recipients!

Through the Budget Reconciliation process of last year, President Reagan made substantial progress in the area of block grants, although he did not get all he wanted. While 57 categorical programs were consolidated into 9 block grants, some "strings" still remained and many of the large programs, such as the Education of the Handicapped Act, escaped consolidation altogether.

Whether we side with the liberals who denounce block grants as a return to the days of states' rights and an abandonment of federal concern for the needy, or we support the Administration as they argue that state officials are closer to the people and often can find ways to use taxpayers' money more effectively and efficiently,

--- the hard facts are that you cannot make use of financial resources you do not have.

Looking at the "block grant" as part of the total plan, one can hardly forget an early message that President Reagan gave the American people. He promised the people of this country that budget revisions for economic recovery would be fair and evenhanded, and that low-income elderly, minorities, women, children, disabled and other disadvantaged groups --- the "truly needy", would not suffer under his cuts. I am afraid that just would not be so if block grants were to become a reality for handicapped education programs.

Tied to the issue of "block grants" is appropriations. This is the actual amount of money that Congress decides any specific program will receive in any given fiscal year. In this Administration, the Office of Management and Budget "calls most of the shots" in this area. In order to move toward a balanced budget, extensive cuts must be made. Unfortunately, education is one part of the budget that can be reduced simply by appropriating less. An interesting comment was made by a Department of Education staffer during an appropriations hearing in the House last year. She said that even if these proposed cuts were accepted, no children would be dropped from programs, only services to these children would decrease. From my perspective "inferior" services seem little better than "no services at all!"

Last, but probably not least important, on this Administration's education agenda is their plan to dismantle the Department of Education. For many conservative Republicans and others, the Department symbolized the worst Democratic drift in education. They found it:

1) plodding and uncreative in its action,
2) political by nature, and
3) responsive to every special interest group.

Throughout his campaign the President indicated that one of his missions as President would be to wipe out the Department of Education. When the Secretary of Education, Terrel Bell, took his job, he knew that one of his first tasks would be to prepare a series of recommendations for President Reagan on how this could be accomplished. The final list of recommendations included:

1) an independent agency or foundation,
2) dispersing ED's programs to other federal agencies, or
3) returning to the old HEW organization.

It is apparent that Bell's choice is the "foundation"; however, it has been modified to include the transfer of some programs to other government agencies --- such as Vocational Rehabilitation to Health & Human Services and Indian Education to the Department of the Interior. You can imagine the administrative nightmare that this type of transfer might cause states as they would have to deal with several different agencies depending upon their specific education concern.

Any change, however, in the status of the Department of Education would require the passage of legislation by Congress. Some bills have already been introduced, but, as of yet, the Administration has not sent their bill up to Congress. Many members who supported the creation of the Department seem reluctant to support any effort to de-emphasize education as a national priority. Deliberations on this issue in the coming months will be in the Government Operations Committee in the House.

In the final analysis, one must remember that this Administration firmly believes that the only appropriate federal role in education is technical assistance and research.

Now that I have outlined the "global policy" of the Administration with regard to education, let's take a look at the specific issue of legislation regarding education programs for handicapped children.

In April of last year the Administration proposed that 44 education programs be merged into two block grants, one to local education agencies (which included Education for the Handicapped) and the other to state education agencies with a funding cut of

25%. These efforts --- to repeal P.L. 94-142 through block grants --- were not successful, but instead drew sharp criticism from concerned citizens (such as yourselves) and numerous legislators who argued that the repeal of this law would undermine a decade of progress for handicapped children and their families. Not only was the law not repealed, but the Budget Reconciliation Act set a maximum funding level of $1.1 billion for programs under the Education of the Handicapped Act, which was a slight increase over the 1981 funding level. I would like to say that these successes the House and Senate were able to achieve were largely a result of the diligent efforts on the part of all of you in the field! I want to congratulate you on a job well done!

The Administration, however, has not yet given up! After failing to repeal P.L. 94-142 and failing to achieve major reductions in funding for the Act in 1981, they are once again involved on several fronts in attempts to drastically curtail the federal role in special education. Current activity is focused in three specific areas:

1) deregulation,
2) FY 1983 budget, and
3) substantive technical amendments to the statute.

It is quite clear to most advocates involved in special education policy that many of the proposed changes in the federal regulations for the Education of the Handicapped Act, if adopted, would significantly hinder public participation, especially by parents, in the education process. While specific information on these proposed changes has not yet become public, it is rumored the Department of Education will recommend that the detailed list of related services that schools must provide be dropped, and that criteria for selecting hearing officers be deleted along with criteria for conducting due process hearings. These are just some of the possible changes that we could see in the proposed regulations when they are published in the Federal Register in early April. While Congressman Austin Murphy, Chairman on the Select Education Subcommittee, has been supportive of the regulatory review within the Department of Education, he feels strongly that regulations which provide guarantees and protections to both handicapped children and their parents must be maintained. It will be critical that all persons concerned with the education of handicapped children provide comments to the Department of Education during the 60/90 day comment period in order to prevent serious dilution of the intent of P.L. 94-142 through this deregulation effort.

With regard to the 1983 budget, I would like to use the words of David Broder in his recent op-ed article in the Washington Post: "I think it's fair to say that in the plainest language yet put forward, this budget says that the clear, concerted and forcefully applied strategy of this Administration is to grind down the domestic side of the national government between the millstones of a rising defense budget and a declining tax base. It is what President Reagan himself calls 'a long overdue reordering of priorities', and what many others will see as an abandonment of national responsibilities." For handicapped education programs it would mean a 27% reduction for programs consolidated with P.L. 94-142 (an already grossly underfunded program) and a 13% reduction in the discretionary programs.

Lastly, with regard to amendments to the statute, the Administration appears to have learned something from their experience with Congress last year. Since they now know that "Repeal" is a "red flag" for most Members of Congress, they will no longer propose the repeal of EHA through block grants, but they will propose "major technical amendments to the statute" in the areas of due process, related services, the IEP and notice of consent to parents --- just to name a few! I can imagine what you are thinking --- "What would we have left?" . . . and I think you are exactly right!

Please remember though, that if it "walks like a duck, and quacks like a duck, it must be a duck" --- even if the Administration refuses to call it that! Do not allow yourself to get sucked into the rhetoric: while the Administration sees a new role for the federal government in their grandiose proposals to return many of the federal programs back to the states, there has been little, if any, discussion of how we can do this and still retain high quality services for handicapped children. Most decisions at the federal level are being made on the basis of economic reasons rather than any knowledge of program substance. To date, there has been no Administration official, to my knowledge, who has shown an interest in discussing the issue of how we could look constructively at the EHA statute and make changes that would ultimately allow for the provision of better services to kids!

The prospect of deregulation, drastic budget cuts and debilitating amendments to P.L. 94-142 proves once again the Administration's intent to weaken the law and reduce the federal government's role in special education. Many advocates believe this to be a signal to states and local governments that the Administration is not desirous of continuing current special education programs. There is also increasing evidence that certain states and localities would also like to pull back from their special education mandates. However, I would have to say to you that if we crawl into a hole and put a rock over our head and mumble to ourselves about how terrible this situation is --- we will, no doubt, end up in the same boat as many of the less fortunate human services programs of last year!

And that is why I am afraid I must turn to you folks again . . . . See, that's the problem with doing such a good job at something . . . . you are always asked to do it again!

While most Members of Congress hate to be put in the position of continuing to defend the "status quo", this Administration is still "holding a gun to our head" with regard to handicapped education legislation and we are unwilling to open the statute for amendment when we know that they are just waiting to wipe the whole thing off the books! Therefore, the Subcommittee on the Handicapped in the Senate, chaired by Senator Weicker from Connecticut, and the Subcommittee on Select Education in the House have taken the position that we will support the maintenance of current levels of funding for this program and no substantive changes in the statute at this time. Perhaps at some time in the future, after we have made constructive attempts to reduce implementation problems with the statute through the regulatory review, we might then want to look at whether amendments to the statute are necessary.

Therefore, I must ask you to begin educating your legislators at the local, state and federal levels. Thanks to the efforts of many of you, we were able to gain the support of over half of both the House and Senate in signing a bi-partisan letter which was sent to President Reagan on February 5, 1982 in support of the Education of the Handicapped Act. The support for this program does exist, just as it did in 1975 when the law was passed. But, with the many competing interests that legislators face today, it is very easy for them to hear only from "the lunatic fringe", as was suggested to you the other evening.

I would suggest to you that you take it upon yourselves in the months ahead to use this opportunity to get to know your local, state and federal elected officials. One of the ways that seems most effective to me is to get to know the staff person who handles handicapped education for your Congressman or Senator on a first name basis. Call for information from time to time and then, of course, drop him/her a note and thank them for taking the time to give you an update on this issue. This will not only help you, but it will help that staff person to become more knowledgeable on handicapped education legislation, which will then provide that Member of Congress with a better information base. If you happen to be in Washington, make an appointment to stop by and chat informally with that staff person. Remind them of why the federal government became involved with this issue in the beginning: children out of school and many inappropriate programs. Let them see you as an informed, levelheaded, constituent who is looking out for what might be best for all persons in that Member's district: not a member of the lunatic fringe. Then when it comes time for an important vote, or an attempt to get that Member to sign a letter to the President (for example), you have already established credibility with that staff person and with your Member of Congress and you are more likely to get the desired response.

I once heard an amusing story about two Congressmen that I thought was relevant to the next issue I want to bring up with you: One of them was congratulating the other for changing his views rather sharply on an issue by saying: "I'm glad you have seen the light!" "What do you mean", came the reply, "I didn't see the light, I felt the heat!"

We hope that the landmark legislation on free appropriate public education for handicapped children can stand on its own merits. However, we know that this is an election year for all Members of the House and some key Members of the Senate, and that is why your efforts can provide the "heat" that can be so effective. Get your Member to come out to visit a project or give a speech and offer him/her some news coverage. This way you will both be getting what you want --- you will get the chance to further educate him/her on the benefits of education programs for handicapped children and he/she gets visibility needed for a campaign.

In summary, I would like to emphasize two points:

1) As an old adage says --- "If it ain't broke, don't fix it!" The Education of the Handicapped Act is working successfully to bring federal and state education officials together with teachers and school administrators across

the country to provide a free appropriate public education to nearly 4 million handicapped youth. With this modest investment we are saving the federal government the very high costs of public assistance for many handicapped persons in their adult years.

2) All of us who are concerned about the future of handicapped education in the next decade MUST coordinate our efforts and present a united voice if we are to preserve this legislation we now have that provides guarantees to both handicapped children and their families. If we allow our special interests to cause us to split, we have a situation where almost everyone loses! Especially the handicapped children!

In closing, I leave you with just one thought regarding the role of the federal government as it was described by the late Hubert Humphrey: "The moral test of government is how it treats those who are in the dawn of life, the children; those who are in the twilight of life, the aged; and those who are in the shadows of life, the sick, the needy and the handicapped." Let us make sure that our government continues to pass the test.

## Responses

### Jack Hazekamp, California, President, SECVH

One point I would like to make regarding funding cuts based on our experience in California is that when there is not sufficient money to meet the mandates of the law, intense problems are caused not only between school districts and state departments of education but between parents and school districts. We get into adversarial situations because parents have the expectations based on the law and there is not enough funding to meet those expectations. Once that adversarial situation is set up, the team process which is the essence of P.L. 94-142 is destroyed. We really have to come to a point where we need to say if we do not have the funding, we must cut some of the mandates.

If we do reduce the mandates, I have some suggestions. We need to cut out some of the "administrivia" and to look at the mandates in terms of what really has a beneficial effect on the child. We need to emphasize quality rather than strict compliance with the law.

Special Education is not very popular at this point. There are some people who think that special education is taking all of the money away from regular education. One reason that this has happened is because of the deficits in special education and deficits must come out of the local general funds of the school districts. This is disasterous because we are getting a backlash from regular educators. They think we are stealing money from their programs. We all know how critical a good relationship with regular education teachers is.

The block approach is a particular problem with the low incidence handicap populations. If special education is blended with other kinds of programs, we will not have much of a voice. In California we have a block grant funding system in how the state dollars go to the local districts. Basically, there is a lot of local control. The squeaky wheel gets the grease and the higher incidence populations get the lion's share of the money. Thus, there needs to be some protection within the block grant system for low incidence handicap populations.

A similar situation exists regarding the regulations. Very often the low incidence populations are not properly represented and do not have the numbers so that many times the regulations are geared toward the higher incidence populations. Another thing we need to do is to become politically active. At one point, special education was very active politically. I am not certain what happened but there is now a lot of in-fighting among various groups. Because we have so many organizations, we are seen as being divided. I hope that one outcome of this conference is a resolve to pull together and become politically active at the federal, at the state, and at the local level. We need to become educators of decision makers in addition to being educators of the visually handicapped. We cannot remain isolated as we have. We need to join with other organizations to let decision makers and the general public know that the needs of visually handicapped are very special, that it is not cost effective in the long run to cut programs because these individuals could become tax liabilities rather than tax assets. Special education is one of the few programs that actually makes money in the long run. We need to let people know that.

### Hugh Pace, Kansas, CEARSVH

Although the reduction of federal funding in most cases may not have the immediate impact on the residential schools as it will have on public school programs and the universities, we certainly will be effected. In large measure in our continuing cooperative efforts with public school programs and our reliance on the universities to provide quality teachers for our own programs, we know more than ever how critical it is for all of us to communicate and cooperate. It is vital that we not only communicate with each other but, as has been pointed out earlier, to communicate effectively with state and federal officials.

Yesterday I received copies of a portion of a publication entitled "A Guide for the Powerless and Those Who Don't Know Their Own Power" by Samuel Halpern, Institute for Educational Leadership, Washington, D.C. The particular section I refer to is entitled "A Politician's View of Educators in Their Own Words." If the following quotes are a true reflection of a legislator's view of our ability to communicate, then I think we need to move toward improvement. I would like to share two of many quotes with you. The first one: "Educators ought to know how to communicate but there are few groups that speak less clearly, less concisely. Instead of precise, comprehensible here-and-now language, what we get is usually too Olympian, too Utopian, too abstract or too fuzzy to be helpful. The other side of this talking over our heads in jargon and verbiage is a tendency of many educators to talk down to us as if we were some lower form of animal life. In either case real understanding is seldom advanced by the way educators communicate with us." The second quote: "Educators also run counter to sound political practice by splitting, that is, by playing off their part of education, (higher, elementary, secondary, libraries, school boards, state education agencies, teachers, etc.), against other education interests instead of a united educational front. We are faced with warring factions, a situation in which almost everyone loses."

Certainly I am hopeful that at least our subgroup of educators is no longer a warring faction.

Rosanne Silberman, New York, C/U

Recently, Al Shanker, the teacher's union official in New York, commented that we are now celebrating the 100th anniversary of the birth of Franklin Delano Roosevelt who gave us the "New Deal", at the same time President Reagan has come forth with a series of proposals which we consider a "Raw Deal." The message that is coming through clearly is that we, the leadership people sitting in this room, must take heed and not remain passive. There have been rough times, years and years back, and we came through. We have to believe and work and come through this one also. We must push on past the gloom or else we will sit and be miserable for the rest of the decade. Speaking for the university personnel, I think that we have sat back. It is really critical for us to insure that letters be written, visits to our congressmen be made not just on the national level but on the state and local levels. It is time that they hear from us and meet with us.

We must further recognize the need for political action. Our professional organizations are very involved in this but everyone has to become involved and as teacher educators, we must infuse this material into our coursework because it is not just for today but also for tomorrow. If we infuse it into our coursework, then we are leading our students to become part of this political action network.

We ourselves must become involved with school boards and state boards, as part of our community service. We do need to become partners with the private sector, with the community. There are many people out there who are willing to help but we just have not tapped that resource.

We also have to look at alternate models for teacher training and to do this, we need the support of the state consultants and administrators from the residential schools. When we have problems with our own universities because of rigidity, with the help of other leadership personnel it may be possible to modify regulations. We must work together to help teachers become certified and maintain quality programming so that teachers are well prepared to work with visually handicapped.

### Julie Todd, Ohio, IRCVH

I will speak first about some of my personal experience with this topic and then give you some views from our organization of IRCs for the Visually Handicapped.

Ohio is extremely fortunate not to have the billion dollar deficit that was mentioned; but we do have our fiscal problems. We are fortunate to have an active coalition of parent and professional organizations working on behalf of special education. One person from the group is able to spend time in Washington inservicing legislators. We have the mechanism to get the information from Washington distributed throughout the state within two days in a written form; we have had the thrill and excitement in experiencing the initiation of phone calls and letter writing campaigns to legislators in Washington. We have found that it is extremely effective. If you have not had the thrill of doing that within your own state, try it.

State and federal legislators do need to be inserviced into what is going on and how federal dollars are being used. Recently, we had several new legislators who had no idea how preschool incentive grants were used. They were invited to spend a few days in several such programs and one legislator commented that if all legislators received that inservicing, there would never be any questions whether that money was being well spent. Many times we just do not take the time to get someone into the classrooms or into our centers that are operated with federal funds.

We in the association of IRCs for the Visually Handicapped can help you in many ways. We can coordinate the delivery of services and materials for teachers, parents, and students on a state level. We can help the university, the residential school and the state department of education find the information they need. We are "dofors:" whatever anybody wants done, we do. The IRCs can be a mechanism for coordinating a lot of resources. We make certain that large print and braille books and braille writers get reused so that they are not on shelves in school districts gathering dust. With a mechanism set up for circulating materials a great deal of time and money can be saved. If you need information circulated to parents, teachers, students, administrators, or whatever, and you do not have the personnel, the time, or the equipment to get that information out, an IRC for the Visually Handicapped can very easily do it for you. The IRCs for the Visually Handicapped can coordinate our very, very limited resources for more efficient and effective use.

## III

## Creative Options for Quality Service Delivery

In the light of the reduced fiscal resources and limited potential for a change in the immediate future detailed in the previous section, other options must be explored and new roles assumed if we are to maintain quality educational programs for visually handicapped pupils.

This section includes three papers: the first presents suggestions for tapping into a little used resource in education, namely, volunteers, and outlines six principles that are basic to initiating and implementing a volunteer program. The second describes the resources available in the private sector and suggests ways of tapping into those resources. The final paper challenges educators to function more effectively as advocates in order to achieve the goal of quality services.

### Tapping Into Volunteerism

Stephen McCurley

VOLUNTEER: National Center for Citizen Involvement

As financial resources become more limited, it becomes increasingly desirable that more citizens become involved actively in educational and social service programs: thinking, planning, fund raising, and doing work inside those programs. Our organization encourages this movement in a number of ways and like other nonprofit organizations, we act as an advocate. We do a little legislative lobbying and a lot of arguing with government officials; we do a good deal of general advocacy work with the media and with the press; we do general technical assistance, that is, training and consulting with groups, conducting conferences, preparing publications; and we do a lot of special projects. Let me talk briefly about some of the special projects because it will give you some idea of the breadth of the program.

We are currently involved in several carefully chosen to illustrate different new areas where volunteers can become involved. For example, we have an extensive project in the area of corporate volunteering. Four years ago we began by doing a survey of the Fortune 5000 to identify those companies which were willing to put their employees out in the community as volunteers on a released time basis or were encouraging employees on their own time to go into their communities and donate services. We were able to identify over 500 companies who were willing both from their national offices and their subsidiary plants to assist local community gruops by making the services of their employees available, by donating money, by donating Xerox machines or printing facilities or other expertise, manpower, or materials. With the help of these corporations, we are now in the process of sponsoring local and state conferences to build up the number of corporations engaged in such activities. We recently finished one conference in California for about 60 corporations, another one in Texas for about 40 and are planning ones in New Jersey and Minnesota this year. What we are attempting to do is to teach coporations that one way they can help their own communities and help themselves is to make a concerted effort to donate their materials, manpower, and expertise.

We have another skills bank project to test a new way of recruiting volunteers. Most agencies or organizations who have volunteer programs recruit them by asking a person simply to serve as a volunteer for some type of ill defined job for an ill defined period of time. A skills bank provides an alternative method for recruiting volunteers by preregistering people who are willing and who have some specific skills. For example, we go to a corporation and request permission to do a survey of employees to find out who have skills they are willing to donate to local groups. Employees list their specific skills and the amount of time they are willing to donate periodically throughout the year. A community group with a need for a specific skill would go to the skills bank and list the characteristics required. The computer then matches the needed skill with a person. The skills bank is the reverse of the old recruitment system. Rather than dealing with a large pool of volunteers who would come in and donate their warm bodies for a long period of time, the skills bank volunteer comes in to do a well defined task for a short time period identified in advance and may work for five or ten different organizations throughout the year. It is a process by which many more professional people are willing to become involved because they know what they are going to be asked to do and for how long. For the past two years we have been testing different ways to set up skills banks ranging from a very sophisticated computerized system to a 3x5 card system so that any size community or group can set one up and tap into some very professional resources as volunteers.

We have a third project, a family project which is designed to test a theory that the family that volunteers together stays together, operating in the northwestern United States. It identifies volunteer jobs that a family can do as a unit. Probably the most successful one is the "adopt a person" wherein the family adopts a person trying to make a transition into the community. The family unit provides counseling, care, advice and help to that person. It is a way of testing whether or not both the person getting the care and the family itself can derive something unique out of a relationship. The family works as a unit to provide advice or assistance to a person and the person, rather than just dealing on a one-on-one relationship, deals with a larger unit of society. It is an interesting project, about a year old, so we do not know whether it works or not. It is one way of testing whether you can strengthen the fabric of the family by getting people once again involved in a helping relationship with others in their community.

About a year ago we finished another interesting project. Many of us claim that young people in this country are no longer interested in getting involved in their community. We decided to deal with that problem by teaching the concept of volunteering. We designed a curriculum that had two parts: an in-classroom part that taught the history, theory, and philosophy of why citizens should become involved in their community and the different ways of becoming involved; and an out-of-class service unit in which people were placed with community organizations. We put the curriculum into about 60 high schools and 30 of them, even though the project has been out of operation for two years, continued it with funds from the school district. This may be one method of expanding the idea of teaching volunteering to people. Although designed for the high school level, we think it would work as well in the junior high or even the elementary level, enabling students to learn how to go out in their community at an early age and to become involved by being of assistance to someone in the community.

More than any other organization or agency, we probably have the broadest depth of experience with getting people involved. We work in the course of the year with about 5,000 different agencies ranging from education to criminal justice to health, and ranging in size from very small local organizations to large national groups, public and private, as well as profit making corporations. What we do for those groups and what we take from them is what we are beginning to call the science of volunteer management, that is, the techniques by which a group or a person or an agency or an organization of any description can begin to utilize citizens as volunteers inside their programs. Our experience over the past ten years has identified for us certain common techniques that work better at getting people involved as volunteers, better ways to recruit, better ways to motivate, better ways to recognize them, better ways to get them interested in projects so that they are willing to donate their time, expertise and interest to helping you do a better job. Obviously we have some very strong biases both about the advisability and about the ease for getting volunteers involved.

Who are the people who get involved as volunteers? Many have a vision of the volunteer in America as the little old lady in tennis shoes who skips happily along scattering largess with both hands to the adoring poor people. In fact, that image has always been inaccurate. The male/female ratio amongst volunteers is just about 50-50. Working people do more volunteering than those in the housewife classification. There is no increased loss of volunteers because more women have gone back into the job market. In fact, volunteering in this country is so endemic that practically everyone during the course of a lifetime does a substantial amount of volunteer work. It is estimated that the gross value to the national product in this country of all that volunteer activity is about $65 billion a year, obviously a substantial amount of activity. With half the population involved in volunteer work, we are looking at a resource that means everyone in this country is a potential target as a volunteer for an organization; that there is no type of individual that is immune from being recruited as a volunteer. In fact, given the right incentive anyone is likely to become a volunteer in this country as long as they are properly motivated.

With the potentials of that universe available, let me now talk about some principles necessary for establishing and operating a successful volunteer program. These principles are most often ignored. There are six questions that one who is either beginning to operate or who is operating a volunteer program ought to be able to answer. These are:

(1) Why do you need volunteers? Before initiating a volunteer program, you must be able to describe the reason for having a volunteer instead of a paid staff person. It is necessary to answer that for several reasons. It will help you when paid staff people ask why

that volunteer program is there rather than increasing salaries to do the work. You need to establish in your own mind, and in the minds of the volunteers and the rest of the staff in your agency, why it is that the volunteer program is there. What is unique about what the volunteers are going to do that cannot be done as well by any other mechanism. There must be a unique reason why the volunteer program exists: something it does that could not be done as well by any other mechanism. What is the difference between the volunteer component and the paid staff component? Why do you need both? Oddly enough, most groups never address these questions. They take it as an assumption and that assumption causes the most staff-volunteer conflicts in any agency. Finding a positive answer provides an affirmation of why the volunteer program needs to exist inside that agency.

(2) What do you want volunteers to do inside your agency? What types of jobs are the volunteers uniquely suited to do? Obviously there is a wide range of activities that volunteers can do. They can provide administrative support help, anything from filing, to envelope stuffing, to typing, to all the little jobs that everybody hates to do but are essential for the operation of an organization.

They can help with direct counseling with clients, not the informed counseling but rather establishing the helping one-on-one relationship, the caring relationship. A volunteer is probably better suited for this role because the client can look at that volunteer and say: "Here is a person who is coming to help me simply because he cares. Nobody is paying him to do it. He is here because he thinks I'm a worthy individual and he likes to be of assistance to me." That psychological support is something volunteers have that a lot of us burned out paid staff do not have.

They can provide instruction and tutoring. Obviously those who are trying to help 60 or 75 clients realize that there is not enough of us to go around to provide a lot of the simple assistance we would like. Volunteers are able to meet basic tutoring, instructional or informational needs of the clients.

Volunteers are more than adequate in doing a good many of the community transition type activities, such as, teaching a client who is moving out into the community about the resources, how to get in touch with what is happening inside that community, providing a base for the client once they are out in the community so they can have on-the-spot assistance that paid staff are often not able to provide.

Volunteers are quite adequate in working in the decision-making framework: providing research needs inside a community, helping you to decide what the needs of that community are, helping to make decisions about what the priorities of programs should be, serving on the board of directors, serving on advisory committees, serving just as advice-givers about what is going on and what decisions need to be made in order to meet what is most needed inside the community or among the client group.

Finally, volunteers are very useful in fund raising in one way or another.

In essence, in answering the question what do you want those volunteers to do, you need to be able to write an adequate job description for the potential volunteers that tells them very precisely what it is you want them to do, when you want them to do it, where you want them to do it, and who is going to help them in doing it. Whether you pick out a job function that is administrative, counseling, instructional, or decision making, you need to have thought out in your own mind precisely what the parameters are that you expect of the volunteer who steps forward. When they come up to you and ask you what it is that you want them to do, you are able to say quite cogently and quite frequently "I want you to come to our operation; I want you to be a counselor; you will deal with three clients over the course of the week; this will require about two hours of your time every week; I will need for you to go to the homes of these people to do that; it will require you to have your own transportation for which we'll provide reimbursement for the mileage; and I'll expect you to do this over the course of the next six months. In this way, the potential volunteer knows exactly what you want them to do in order to fulfill what you need from that volunteer.

(3) Once you've decided what it is that the volunteers are needed for, what you expect them to do and what you want out of them, what is it that you need from that volunteer in return? What types of characteristics, what types of skills should that volunteer have? Basically your needs of the volunteer fall into two categories. First, there are the intrinsic characteristics that the volunteer needs to have. For example, you might need a volunteer who has fluency in two or three languages, simply to deal with the client group. You are obviously not going to be able to teach that person Spanish on a short term basis so you need to have that ability before they come to you. You might need a volunteer able to deal with troublesome clients or capable of dealing in a flexible or fluid situation where there is likely to be trouble, or you might need a person who has something, such as, their own automobile. In any event, you need to identify what it is about the volunteer that they must at a minimum have before they can be suitable for your volunteer job. Secondly, you need to identify what skills the volunteer needs for the job that you will provide to them. You may need, for example, a volunteer who can fill out certain onerous federal forms or who can do the record keeping, or who is willing to keep track of all the hours or the instructional units provided for clients. You need a person who can talk about certain types of community resources that are available, one who is able to act as an intervener on the part of the client and thus must have the intelligence and the knowledge

to understand certain civic or county or state requirements and be able to translate those to the clients and to act as an advocate. Those are things presumably you can teach the volunteer but you need to examine those things and make sure that you can design a training unit that is suitable for the volunteer. You must have a long enough time period so that the volunteer can learn the skills, knowledge, or expertise.

After designing the job for the volunteer, you need to take a look at the job and say what is required in order to, according to your standards of adequacy, perform this job, to categorize those requirements and to make certain either that the volunteer already has those requirements or to make sure that within whatever time period you have, you can educate the volunteer. This third question then is obviously what does the volunteer need to know and how can you ascertain either that they have it or that they can acquire that knowledge within the time period you have available.

(4) What do you need in order to effectively utilize those volunteers? When they walk in the door, what type of structure, what system or type of organization does your agency need in order to effectivly make use of that resource. Obviously from agency to agency, that system is going to vary as well as from type of volunteer to type of volunteer. It is, for example, a lot different getting the housewife in and getting the chief executive officer (CEO) of a major corporation in to do volunteer work because they come with different expectations. The CEO, for example, might expect to have a private office with carpeting, a secretary and typewriter. Very often that is not what you can provide. So the system varies according to the volunteer and according to the types of things you are asking them to do.

The management system required of an agency for a volunteer is not much different in concept than the management system that is required for any other type of employee. If you want to think about a volunteer program, one of the best ways you can begin to conceptualize it is to throw out the word "volunteer" and insert the phrase "unpaid employee." At that point you think about volunteers as simply another type of employee but with the odd characteristics that they are unpaid and have an astounding amount of flex time. Call your volunteer coordinator, the "manager of unpaid personnel." It will make him/her feel better and it will probably more correctly identify the job. Once you begin thinking about him/her that way, then all of the management structure which you presumably have for your paid employees begins to carry over for the volunteers. You need the same types of intake systems; you interview, screen the person for the right job and provide the same training which you provide your paid employees; you need the same record keeping system, evaluation system, and the same supervisory people around to make sure that they are either being helped to do or are doing the job. A volunteer management system is very much the same in terms of structure as the management system for paid personnel. It is not, however, identical because as much as we would like to believe, it is a bit harder to operate a volunteer program than it is to operate a program with paid staff because with paid staff you always have the carrot and the stick of being able to fire them and take their livelihood away. With the volunteer person you have to rely on a much more indirect form of motivation and incentive, that is, making those people believe that you are allowing them to do something worthwhile for your organization. If they do not think you are doing that, they will get up and walk out a lot more quickly than paid staff who are depending on you for their salary. Thus, although the two systems are parallel, the same things that operate for the employee who is paid should operate for the unpaid volunteer employee.

In summary, you need to establish the system before you begin to utilize those volunteers and you must be willing to invest the resources to set up a system. Volunteer programs are not free.

They cannot simply be slapped into a structure and expected to work with efficiency. They have to be integrated into what you are doing; they have to be treated serously; and if you are not willing to devote the resources, the time and the intelligence to integrate them, then it is inevitable that you will have problems with the operation of your volunteer component or it is not doing everything you expected it to do or it is doing it in a troublesome fashion. The management system that you need should be at least as coherently developed as the system that you have for the rest of your organization with all the same components.

(5) You need to look at your volunteers and say: what can we do for them? The first two questions identified what they could do for you but more and more volunteers are asking of people before they volunteer: what do I get in return from your organization. By far, the primary benefit is the sense of doing good. But more are asking self-interest questions: What do I get out of being a volunteer for your agency? Do I get reimbursement for all my expenses? for my mileage? Do I get a recognition dinner once a year? Do you keep track of all the training I'm getting so if I ever want to make the transition to a paid job, I can use you as a reference? Do I get a feeling that you think I am a worthwhile individual or do the staff sneer at me as I walk down the corridors? You need to make a case to volunteers of what is in it for them because they are going to expect to have a rationale laid out for them. It is a marketing pitch, a sales pitch, a simple explanation of why they should work for you rather than the other 42 agencies out there. As the competition heats up for volunteers, that item is going to become more crucial.

(6) Where do you find volunteers? How do you get them? How do you recruit them? If half of the population is doing volunteer work, it should be obvious that it isn't all that difficult to find them. All of the recruitment and motivational studies about volunteers indicate that the best method for recruitment is one-on-one.

not media campaigns, not radio, not brochures. The best recruitment strategy is to take your own volunteers and ask them to go out and do a sales pitch to a neighbor or friend and have them bring that person in to try the experience. Volunteers get recruited more often by word of mouth or by being convinced by their friends than by any other mechanism. The reason is evident when you consider the reasons why people volunteer. They volunteer because they like to think they are doing good for their community; they like to help other people; they like to feel that they are doing what they are supposed to in this world. By having your own volunteers recruit others, you are catering to that basic need. You are having one person who is already volunteering for your agency go out and say to another person: "This is a good organization for which to volunteer. I work there; I believe in it; I believe that what it is doing is good for the community; I believe that my volunteer experience is a good thing for me and a good thing for other people." In this way, potential volunteers have a dual basis for saying yes. First, they have a friend telling them it is a good thing to do, thus catering to their own psychological need; and second, you have a person who is saying, "Yes, I believe in this organization."

Most agencies have few problems finding volunteers once they go about it in an organized fashion, thinking through why they need the volunteers and plotting out the case that they can present to prospective volunteers. If you take the trouble to do that, convincing people that you need them is not a very difficult task.

Those are six very basic principles that, as simple as they are, tend to get ignored in volunteer programs. For all of you who are either beginning a program or are in the process of operating one, there exists a very large body of resources that can help you: local, state and national conferences about volunteer management; a good many books available on the subject; numerous publications about how to operate volunteer programs, from the board member down to the service volunteer; many agencies at the local, state and national level who have learned how to effectively utilize volunteers and who will share that expertise with you. It is not necessary to re-invent the wheel, because there is a large body of existing information that can tell you how to make better use of the resources that you have. It is merely a question of whether you will pay attention and treat the volunteer component as something that does not happen by chance or by whimsy or by fancy or by accident. Volunteer programs can stumble along as they have for years or people can begin to utilize better techniques that have been developed to get volunteers to operate more effectively and those techniques can be stolen by you and used inside your own agency.

What I have talked about so far is really how volunteers from the outside can come in to help you inside your agency. Now I want to talk about the reverse of that. One of the big fields is self-help volunteering and among the handicapped it is probably the fastest growing area. We must remember that there is a good resource of volunteering among the handicapped themselves. We have recently initiated a new project, called the Handicapped Youth Project sponsored by the Kellogg Foundation. It is operating in about five sites across the country. The project is modifying the curriculum that we developed for high school students for use in schools for the handicapped in order to get the handicapped involved as volunteers not just for themselves but for other agencies. It is a rather interesting and exciting project and by far one of the most successful ways of operating volunteer projects among the handicapped. In it the handicapped themselves go out to other agencies and thus learn how to do better things in the community in addition to demonstrating to other community agencies what skills and expertise they have to offer.

In conclusion, in a very short time period, we have presented some basic principles of volunteer management. For those of you who are operating programs, it is possible to do a better job if you are willing to pay more attention to it. In the past most agencies have paid very little attention to that component, assuming it was something that would just get done. Like any other type of management, operating a volunteer program is a learning experience.

## Tapping the Private Sector

Irwin Brod

American Foundation for the Blind

During the last year President Reagan has stressed the voluntary sector (private sector) as a critical element in his strategy to alter the balance between the government and the people in American society. "Voluntarism is an essential part of our plan to give government back to the people", Mr. Reagan declared October 5th 1981 before the National Alliance of Business. He then announced the formation of a Presidential Task Force on Private Sector Initiatives, to headed by Armco, Inc. Chairman William Verity, which will examine ways of stimulating voluntarism. Considerable attention has been given to the feasibility of employing the voluntary sector as an alternative source of funding to offset the budget cuts.

As we proceed into the 80's and the so-called World of Reaganomics and its relation to philanthropy and charitable giving, we can be sure of three things:

1. The new administration is committed to cutbacks.
2. The impact, at best, of the new tax laws is uncertain.
3. The major component of the new economy is unpredictability.

Let us examine the nature of the Private Sector by reviewing the facts and trends of the giving of America's citizens for the year 1980, the most recent year for which such figures are available. (Figures used are quoted from the 1981 Annual Report - Giving USA - American Association of Fund-Raising Counsel, Inc.). During 1980 individuals, corporations and foundations contributed a record $47.74 billion to charitable organizations, and increase of 10.2% over 1979, an increase that did not keep pace with inflation.

Individuals contributed $39.93 billion or 83.7% of the total dollars, an increase of 9.7% over 1979.

Bequests, gifts in the form of deferred payment to charities, life income programs, gift annuities and gifts resulting from wills totaled an estimated $2.86 billion or 6% of all giving. It is believed that bequest giving increased by more than 28%. When bequests and individual giving are lumped together, they constitute 89.7% of all gifts to charitable organizations.

The country's business organizations, which experienced a decline in overall profits during 1980, increased their giving by less than 5% and donated a total of $2.55 billion. While the increase was small, it came during a year when business, like other segments of the economy, failed to achieve any real growth. Corporate giving represented 5.3% of the total, no increase over 1979.

Foundations gave a total of $2.4 billion, an increase of 7.1% over 1979. Foundation giving represented 5% of the total, slightly lower than the 5.2% of 1979. By Foundations, we mean a non-governmental non-profit organization with funds, usually from a single source, either an individual, a family, or a corporation, and a program managed by its own trustees or directors established to maintain or aid social, educational, charitable, religious or other activities serving the common welfare primarily by making grants to other organizations. The term used here does not include organizations such as the American Foundation for the Blind, National Kidney Foundation, Arthritis Foundation, etc. which bear the name foundation but whose primary purposes are other than the awarding of grants (e.g., make general appeals to the public for funds or act as associations for special groups.)

During 1980 religion continued to receive the largest share of the charitable dollar: $22.15 billion for 46.3% of the total; Education: $6.68 billion or 14%, slightly higher than 1979; Health and Hospitals: $6.49 billion or 13.6%, about the same as 1979; Social Welfare: $4.73 billion or 10%, same as 1979; Arts and Humanities: $2.96 billion or 6.2%, same as 1979; Civic and Public: $1.36 billion or 2.9%; Other: $3.37 billion or 7%.

There are some significant trends within the three main categories of individuals, foundations, and corporations.

## Individuals

As stated earlier individuals contributed $39.93 billion to the more than 300,000 charitable organizations in the United States, an increase of 9.7% over 1979. As a portion of the total, this equalled 83.7%, a decline over the 84.4% of 1979. The AAFRC said giving by individuals in 1980 equalled 1.84% of the nation's personal income for the year (2,160.2 billion, Dept. of Commerce). Individual giving as a percent of personal income was the lowest since 1956 when it was also 1.84%. The highest level was 1970 when individual giving reached 1.99% of personal income. The AAFRC attributed the drop in giving as a portion of individual income solely to inflation in 1980 which the Bureau of Labor Statistics said was 12.4%, the second highest rate since the end of World War II. The increase in living costs in 1980, coupled with the 13.3% rise in 1979 more than likely caused individuals to not only be more selective in their giving but also to curtail giving. As we know, charitable giving is made from discretionary income - money left after food, clothing, housing and fuel costs have been paid. The 1979 and 1980 increases in all of these areas simply did not leave that much to discretionary income.

For those of you from California and New York take heart. Geographically, residents of California appeared to give more than those of any other state - with New York second.

## Foundations

Foundations gave $2.4 billion in 1980, 7.1% higher than 1979. (This figure was boosted by the liquidation of two large foundations in 1980 with assets of almost $200 million: The Woodruff Foundation with $105 million and The Fleischman Foundation with $90 million. The Woodruff Foundation was the founder of Coca Cola and the $105 million was given to Emory University in the form of Coca Cola stock. Fleischman was the gin and yeast company founder.) As a total of giving, foundations equalled 5%, down from the 5.2% of 1979.

Under the pre-1981 law private grant making foundations were required to distribute annually either 5% of their net investment assets or their realized new income, whichever was the greater. In the new law, this minimum payout requirement is limited to 5% of assets. This change should help to reverse a trend that seemed destined to lead to the extinction of the private foundation as an important source of charitable funds. The payout requirement was instituted in 1969 to ensure that foundations distributed a reasonable share of their income each year. The 1970's, however, were a period in which the real value of equity investments fell, while the income yields of most assets rose. Tax-exempt bodies other than private foundations could defend their assets by holding high-yield instruments and reinvesting the proceeds. The payout requirement prevented foundations from using this strategy to build up their financial base. The base eroded and the ability to give consequently declined. As a result, gifts by foundations, measured in constant dollars, have fallen by almost half since 1969, and, according to the Council on Foundations, the total real value of foundation assets has been reduced by about 40%.

The new flat 5% minimum, instead of the requirement that all net income must be disbursed, will enable surviving foundations to repair the damage of the last 12 years and stimulate the formation of new foundations, since the rigidity of the old payout requirement discouraged donors from establishing foundations.

There are approximately 22,000 active grant making foundations in the country. 3363 of them are reported in the Foundation Directory - 8th Edition - of the Foundation Center. These 3363 foundations account for 93% of all the assets of the active grant making foundations in the U.S. and 89% of all the grant dollars paid, even though this group comprises only 15% of all foundations.

While the other approximately 19,000 active grant making foundations comprise 85% of the foundations, they account for only 7% of the total assets and 11% of total foundation giving. This however amounts to $300 million. These foundations should therefore not be overlooked in your quest for funds.

Brief entries for these foundations can be found in the Foundation Center's National Data Book. In many cases they are important as local sources of funding and sometimes serve as conduits for substantial grant-making beyond the capacity suggested by the small assets they report. Oftentimes, substantial sums are placed in these foundations immediately prior to disbursement and never show up as assets for reporting purposes.

Each year approximately half of all foundation giving comes from those foundations with assets of more than $25 million. Although there are only 47 foundations with assets of $100 million - these 47 account for nearly 30% of all foundation giving.

The Foundation Center's Grants Index, which covers gifts of $5,000 and more, shows colleges and universities to be the primary beneficiaries of foundation gifts. In the most recent breakdown higher education received $198.3 million or 16.7% of the foundation gifts listed in the index.

In the overall field of education, which includes elementary and secondary schools, vocational schools, general, adult and continuing education and colleges, foundations donated $313 million, an increase of 3.9% from the previous compilation. But grants to the welfare category, which includes business and employment, community activities, counseling, environment, and activities such as recreation, and rural and urban development, jumped by 30% over last year and totalled $326 million.

The Index found that on a geographical basis 80% of the grant dollars and 75% of the number of grants awarded originated from just eight states: California, Illinois, Michigan, Minnesota, New Jersey, New York, Pennsylvania and Texas.

The Foundation Center is an excellent source of information on foundations and their giving trends and requirements. The Center operates reference collections in New York, Washington, Cleveland and San Francisco and has cooperating collections in every state. I strongly suggest you contect them for their sources of information and publications.

## Corporations

The business community gave $2.55 billion during 1980 or 5.3% of all giving, the same percentage as 1979.

Pre-1981 law allowed a corporation to deduct no more than 5% of its taxable income as charitable contributions. This was raised to 10% by the new law. Some seem to feel that raising the limit on deductable corporate contributions will create an avalanche of donations. Not to worry, the 5% rule has not been a severe obstacle. While some corporations may have felt restricted by the ceiling, the average level of corporate donations in recent years has been closer to 1% than 5%. According to the AAFRC, corporate giving equalled 1.05% as a portion of 1980's pretax net income, the highest since 1970.

The most recent survey covering distribution of corporate contributions was for the year 1979 and showed 37.7% going to education, a slight increase over 1978 and the second year in which education surpassed health and welfare as the largest recipient of corporate donations.

While corporate contributions are on the rise there is a long way to go toward improving the record of corporate philanthropy.

During the decade of the 1970's, corporate giving tripled, from a level of approximately $800 million in 1970 to $2.55 billion in 1980. But only 30% of the 2.1 million corporations registered in the U.S. made any contribution at all in 1979 and only 6% gave more than $500 a year, that is 126,000, not a bad number but here's the good news. Fifty corporations account for a major share of all corporate giving, and yet only 11 of these 50 gave more than 1% of their pre-tax net income in 1979.

Now that you have some background on the giving trends and habits of the private sector and are somewhat familiar with the beast, we move to the topic at hand: Tapping the Private Sector.

What chance do those organizations or groups who have relied on government funding have in the private sector as Johnny-or-Janie Come-Latelies? Would not foundations and corporations continue to give to those they are most familiar with? How does a new group get funded? How do they learn the ropes? How do we reach the public with our cause?

Let me go back to the beginning of my remarks when I quoted President Reagan: "Voluntarism is an essential part of our plan to give government back to the people"; to paraphrase: Voluntarism should be an essential part of your plan to tap the private sector.

Remember those statistics on giving: close to 90% of all giving came from individuals. According to a Gallup Survey for the independent sector, nationwide coalition of voluntary organizations, corporation and foundations, 31% of Americans volunteer on a regular active basis two or more hours per week. The survey also showed that volunteers are more likely than non-volunteers to contribute money to charity: 91% of volunteers have given to charity, compared with 66% among non-volunteers.

People volunteer for needs that are going unmet and people volunteer for solutions to those needs. Certainly there are unmet needs regarding the education of the visually handicapped and many of you have solutions for those needs. What you must do is to bring your cause to the fore in a manner that you have never considered before.

The largesse of government funding in recent years has lulled us into a sense of complacency. We must use the methodology that exists for making our cause known; we need not create new methods but must learn to use existing methods more creatively and effectively than our competitors.

Most of the volunteers you attract are going to be employees in some workplace. If you attract volunteers from the corporate sector, the major corporations, there are numerous advantages that can be gained from those volunteers and the fact that they work for these major institutions.

In the early 70's, corporations were responding to the need for accountability, responsibility in terms of human services and human needs. There was a great cry for corporate responsibility to return to the community that which the corporation essentially had derived from the community. In the 70's the tendency was to throw a lot of money out there in the hope that it would solve the problem.

As the 70's have come and gone, corporations are now taking a new look at their giving programs, their support programs, and they are seeing their involvement in the community differently, acting more efficiently, more in line with good management practices with more accountability. Funds are beginning to go to organizations and groups which can show a good track record, good budget sheets, clear goals and objectives and a plan of action to meet those goals and objectives. It is beginning to become a process that is far more businesslike and is likely to continue in that direction, especially in the current economy and because of the pressure on the corporate sector to help fill the "gap" created by government cutbacks.

Now where do volunteers fit into this picture? There are some corporations which have set aside specific funds in support of their employees who are active community service volunteers. Another aspect involves the use of volunteers to evaluate agency operations.

It is important to realize that a private sector volunteer who is misused can often be very detrimental to your funding efforts. The volunteer can also act as an advocate for your agency and he/she can be your entry into the network of corporate giving. The volunteer from the corporate sector of employment is probably going to be used increasingly as a point of establishing credibility. The utilization of volunteers also indicates that your agency has the management skills to take advantage of volunteer resources to help you accomplish your mission, a point in your favor when you are being reviewed by a corporation.

The same statement can be made in behalf of government agencies. There is a shift in attitude on the part of government agencies in the utilization of volunteers both directly by government agencies and indirectly in a willingness to fund projects by volunteers in one way or another.

The university people should tap into their development offices; learn how to utilize these existing resources; tap into the leverages of volunteers - university Board Members and Trustees. Get the development people to share their experiences and knowledge; learn how to reach out to alumni of the Schools of Education and/or the Departments of Special Education. Get these trustees and alumni to understand the needs; get them involved and you will get their commitment and action.

State agencies need to do more public relations; establish more ad-hoc committees from the private sector; involve the private sector at the policy making level. Community participation is not valid without community involvement. Develop outreach programs to the private sector to explain what you do and why the need; without this the private sector will not trust you. State agencies should tap into policy making givers for advice just as the private agencies do. If you serve clients, review who they are, take a page from the lesson book of successful private agencies: where do they work, do they serve on boards of foundations or corporations, can influence spheres be established. There are numerous directories of corporate leaders, trustees of wealth, Who's who, etc., which can be utilized without violating confidentiality.

The school superintendents should utilize parent groups and the growing phenomenon of parent advocates, such as, the National Association of Parents of the Visually Impaired (NAPVI). Get your parents to organize a chapter and join NAPVI. Harness their energies and potential within your community and state. Follow-up on your alumni and their families to establish influence spheres.

The relatively easy funding era of the 70's brought into being professional management rather than providing for an impact on the problem. Professional managers administer programs not necessarily deal with problems.

We must take a more critical look at what and how we've been doing; our priorities may need to be reordered. What we have held dear may no longer be valid. Retrenchment is with us. We must be more effective if we are to survive. Professionals out of work is not the issue. What is most valid today is the impact of the project on those served. One need only read about the recent trend in labor negotiations to verify this point.

Funding sources are more open today to approaches by organizations that have not previously utilized these traditional sources, as they too are in the reevaluation process.

There is a small but growing trend for public and private ventures. We see this taking place to a greater degree in the urban areas where the corporate community is going into partnership with municipal, county and state governments to provide needed services in a more efficient manner whether it be buying transportation equipment and leasing it back to the government, or rebuilding urban areas, all with increased efficiency. Certainly tax benefits and incentives are available to businesses.

But there is also a lesson here for us. State agencies should begin a dialogue with corporations and foundations. We should become more involved in the reciprocal educational processes between the public and private sector which can only result in a better use of resources: greater availability of management skills to deal with the problem. For example, in New York City there is presently a committee for public and private cooperations consisting of seven foundations, three corporations and two public agencies at work to improve linkages between education and employment for disadvantaged minority youth in New York. Certainly this example can be repeated in our field.

We need to look at models that we have developed that have measureable results and sell them to the private sector. It is not necessary to seek only new creative ideas but rather to creatively apply that which we have shown is and can be successful.

So how do we tap into the private sector? By creative use of volunteers and by beginning dialogues in areas and with groups we have never bothered with previously. Remember there is a need to influence constituencies that did not know you or care about you.

Like all special interest groups we talk to each other in our own language, making assumptions on givens, on what we consider basic. We have to stop talking just to each other and begin to talk, or rather begin to communicate, with others outside of our special interest: communicate in a manner and on a level they can understand, communicate the necessity of our cause and the validity of the needs that are unmet. Remember that educators have a reputation for not communicating effectively to the outside public.

The concept of a case statement is basic to fund raisers - so basic that all too often we take it for granted and forget to use it as an effective tool. What is a case statement? It is a statement justifying and explaining the project (organization or agency) in such a way, presumably, as to lead the reader towards advocacy and support. More simply put, it is a statement of the cause, a demonstration of the needs that are going unmet and solutions to meet those needs; a statement that shows how by contributing to meet these needs something can be done about the problem. A case statement can be a few paragraphs, a few pages, or several volumes including enormous detail depending upon the institution or problem. However, to be effective it must be read. I do not believe that educators of the visually handicapped have ever gone through the exercise of preparing such a case statement aside from the general justification of education. Let me suggest that attempting to outline goals and objectives (the reason for one's existence) as well as the uniqueness of our cause in a brief narrative might be an interesting assignment.

Preparing an initial proposal for consideration by the private sector is quite different than what you've been preparing for the government. Let me illustrate my point with the following incident that occurred just this past Monday: A staff member was relating to me a conversation he had with the Executive Director of a medium size foundation. They were discussing our submitting a proposal. She cautioned that it be brief saying that due to the activity in Washington and the President's budget cutbacks, she had been inundated with proposals. Her desk was so high with paper that it was impossible to see beyond it. If we wanted her to read anything it had better be brief - 2 pages - not a covering letter and 2 pages, but 2 pages covering the essence of the proposal, its impact, and its cost. If there was interest we would be asked either to come in for a meeting or submit a more detailed proposal.

As I travel to and speak with foundations and corporations around the country, I find this to be the rule not the exception.

# Professionals' Responsibility for Advocacy

Sam Negrin

American Foundation for the Blind

All of us, whether we work with children or adults are concerned about quality services for blind and visually impaired people. You, the leadership personnel in the field of education, have the major responsibility for passing on to future generations of professionals, a commitment to a set of values. I hope that when we are through talking today you in your professional training programs, both pre- and inservice, will make some concentrated formal effort to include advocacy as a professional value to be transmitted to students and practicing teachers and at the same time you will assume your professional responsibility for charging them to take on an advocacy role on their own behalf and on behalf of all the blind with whom we work.

We are all in business to improve the quality of services to blind and visually handicapped children and adults. At the present time we are under serious threat of being obliterated by some of the administration's proposals that are being promulgated. It is thus critical that we talk about professional responsibility for advocacy because the survival of the system as we know it or as we want it to be is dependent to a great extent upon what we all do in turning on our own colleagues, turning on the consumers who are involved in receiving the services for which we are responsible, and for developing a partnership among professionals, responsible consumers, concerned citizenry and legislators. It is this combination of people who can do what no one single group can do alone. Educators cannot by themselves turn the tide; consumers by themselves cannot turn the tide; one or two concerned legislators, or even an army of them at this particular point, cannot turn the tide. A partnership of these groups can not only stem the tide but turn it around and get it moving forward again.

During the past few years the Board and staff of the American Foundation for the Blind have had a growing concern about the whole area of advocacy and have increased or accelerated activities, particularly with consumer groups. Several years ago, we were privileged to speak to the presidents of the State Affiliates of the American Council of the Blind, when they met at their annual convention at Salt Lake City. At that time, we chastised them for their lack of involvement or at least their seemingly near non-involvement in significant, aggressive efforts on behalf of their own membership. We asked them why, if they believed and felt so strongly that quality services were important to be guaranteed, were they not out there picketing some of the schools and agencies which are not accredited. Accreditation is the only process available to guarantee through intensive self-study and peer review that they meet standards. We also made it clear to them that we professionals in the field were not doing so well either but we were disappointed as well as frustrated by the seeming inability of the so-called "rational segment of the organized blind" to work in partnership with those professionals in schools and agencies who are the service providers to accomplish those tasks which neither group could successfully take on alone. There are a few rather isolated instances where this is not true but for the most part these tend to be the exception. In general, neither the consumers nor the service providers are fulfilling their advocacy responsibilities. To do so, you must first demonstrate your own commitment to these principles and believe that consumer input is not directed toward takeover or control but rather to sincere concern for improved services. You, as leaders and models, have the burden of insuring that consumer participation is not relegated to mere tokenism with the real decision making power residing within the current power structure. As leaders, you can help to turn things around.

Here are some suggestions for you to begin to expand and strengthen opportunities for consumer input. You can return to university training programs, your schools, your state agencies, and your community and document for your administrators, your boards of directors, legislative representatives, friends, colleagues, neighbors, what happens to people when necessary education, health, and social services are denied to those in need.

You can join in coalitions with other professions and consumers to obtain funding for legislation, to preserve funding, to restore cutbacks in order to help our schools and educational programs become more suitable settings for professional practice. You can speak out in favor of and support of standards for schools and agencies which will insure through the accreditation process that no agency will fall below a uniform floor for the delivery of services and that qualified, trained professional personnel will deliver those services. In our enthusiasm for making effective use of volunteers we have to be concerned about preserving the professional quality of practice; we need professionals who are well-trained in university preparation programs. I am very concerned about the anti-intellectualism, and anti-professional climate currently in society.

If we are to become effective change agents and if we are to do anything about resolving the problems facing blind and visually impaired persons in the U.S., we must be willing to get our hands dirty. That means that we must become politicized, that is, political in the sense that we must see the problem and the dynamics that perpetuate these problems and then develop a strategy for dealing with the dynamics of power and decision making in our own communities and agencies. This is simply a strategy for problem solving and is the political action that the previous papers have discussed.

We need to lend our expertise and our integrity to improve agency and community boards' understanding of consumer involvement and consumer's right to self-determination. Let us speak out. Others have said that educators have problems communicating. Don't worry about how you say it, say it any way you can, but let people hear it. We must become involved with all of the complex service systems that assist blind people, develop our own influence system to improve our credibility and have greater impact with decision makers.

As professionals in work with the blind and visually handicapped we are poorly organized. We spend too much time fighting each other. We need to develop greater skills, greater coalition and greater influence systems in the Congress. We must develop the kind of clout that cannot be ignored by politicians whose primary goal is to get reelected. Let's all be better informed about legislation; so few of us understand the legislation that affects our lives. Let's know more about the legislation that already exists, much of which is not being utilized fully for the benefit of our children. Most of all, let's reach out to our clients and consumers as full partners on behalf of the mutual concerns which bring us together and let's show them that we mean full partnership as advocates for better services. I ask you to teach it, preach it, practice it and demand it from all professionals.

There is a story that some may have heard before, but there is a message for all of us in this story. The popular comedian, Flip Wilson, whom we do not see too often these days, has a number of characters, one of whom is the Reverend LeRoy of the Church of What's Happening Now. The Reverand LeRoy noticed that the collection plate was getting lighter and lighter every Sunday so he decided this particular Sunday morning to give a sermon that would raise more money. He stepped up to the pulpit and said "Brethren, the Church of What's Happening Now is a new church and a new church can be likened unto a new baby." The whole congregation responded with passion: "Amen". He said: "Now a new baby before it can run has got to learn how to crawl." The whole congregation responded in unison: "Make it crawl, make it crawl". He said: "Once it crawls then it can stand up on its own two feet." Now a little louder with more passion they all yelled: "Make it stand, Rev, make it stand." He said: "Once it stands, then it can walk." Now they are yelling at the top of their lungs: "Make it walk, rev, make it walk!" He said: "Once it walks then it can run." Now they are screaming: "Make it run, rev, make it run!" "To make it run, you all have to give more money." They all whispered: "Let it crawl, rev, let it crawl." You know it is up to you whether it crawls or whether it runs. What I am suggesting will not be easy and it will not come overnight, but if we do not accept our professional responsibility and if we do not do it now, we are only going to enlarge the chasm which now exists between consumers and providers, between quality services and mediocrity, between the status quo at best and improved opportunity for blind and visually impaired persons abilities to live with independence and dignity. It is basically up to you.

I would like to close with one other story about a very wise old man in a small biblical town. The youth of the town decided they were going to taunt him and prove to him that he was not as wise as he thought he was or the community thought he was. So on the street one day, the leader of the boys said "Old man, I have here in the back of my hand a bird and if you are so wise, I want you to tell me whether that bird is dead or alive" Now obviously if the old man said the bird was alive, he would have wrung the bird's neck and said, "See, it is dead". If he said it was dead, the boy would let the bird fly. The old man looked at him thoughtfully and said: "My son, whether that bird is dead or alive is purely in your hands." I tell you that whether we survive or die in the next few years is purely in your hands.

## IV

## Strategies for Action

This section is divided into two parts: strategies for organizing the delivery of services from the state level and strategies for mobilizing external resources.

With declining fiscal resources at the state level, there will undoubtedly be a reduction in the availability of consultant services from the state agency. In the first section strategies for service delivery currently used in three states will be presented in order to give participants some ideas regarding how they might employ those practices that would seem most appropriate to respond to the needs in their states. These approaches are: the specialist model as currently used in California; the generalist model as used in Michigan; and the commission model as used in Delaware. The part concludes with a description of the role of instructional resource centers for the visually handicapped in the service delivery system for the state, regardless of its organizational model. Ohio is used to illustrate this role.

The second section describes some strategies for action in the 80's from three perspectives: the role of parents and how to tap that resource more effectively; the need for and possible procedures for improving interagency cooperation; finally, some strategies that can be used at the state level.

### Administrative Strategies

### The Specialist Approach: Jack Hazecamp, California

California does have two specialist consultants, one for the southern part and one for the northern. In addition, there is a Clearinghouse Depository which serves not only visually handicapped students but other students and has responsibility for keeping track of all materials, media, and equipment purchased by state and federal funds. When PL 94-142 was signed by President Ford, he called it an administrative nightmare and it is. At the state department of education level, we now have numerous administrative mandates including monitoring, with little increase in staff. The only option was to reassign specialists or add these responsibilities on to the specialist consultant. We have become quasi-legal people, interpreting the law and wondering at times what all this has to do with children. One of the basic assumptions of PL 94-142 was that if we mandated good practice and we filed paperwork and documentation, quality services would result. This is not necessarily so. We see programs that are in non-compliance but are of high quality; we also see the opposite. Compliance does not necessarily lead to quality.

There are some obvious flaws in PL 94-142. The regulations promote the generalist concept; they do not deal with the interaction between the teacher and the student, that is, the implementation; they are based on good practice for high incidence populations and do not deal with needs of low incidence populations or severely handicapped students. In addition, good practice should not be solidified in law because it changes. What was good practice in 1975 may not be good practice in 1982. We have a good example within our own field regarding the sight saving era which at that time was considered good practice.

There are two major problems with PL 94-142 at the local level. Inservice funds are directed almost entirely toward compliance: procedures, filling out forms, changes in the law policy. Very little funding goes toward improving the skills of teachers Second, teachers spend a lot of time on compliance with meetings and paperwork, taking time away from students.

There are several other issues. The legal profession is now the expert in special education. Educational decisions are now being made more and more in the courts by judges and juries who not only do not know about the visually handicapped or special education, but they do not even know about education. As a result, we have a lot of misinterpretation, particularly in the area of least restrictive environment: they see the regular classroom as good and the residential school as bad, the dinosaurs that should be eliminated. Residential schools are an essential part of our total education program. They can be used as a resource to districts, an assessment center, and a center which evaluates new equipment.

In an attempt to work around the flaws in PL 94-142, we provide inservice on making the most of compliance, particularly those areas which make the most difference in quality. Examples include; assessment where the participants talked specifically about the implications for visually handicapped and in some cases even developed criterion referenced assessment tools; workshops on making the most of the IEP; an annual meeting for administrators of programs for the visually handicapped throughout the state; pulling together coalitions of organizations, agencies, parents, and individuals, to obtain input on regulations. We also initiated a Joint Action Committee composed primarily of organizations which is introducing legislation to change the law in California to make it more responsive to the needs of visually handicapped students regarding class sizes, program options, funding for materials and equipment. It is interesting that our legislature has finally realized that compliance does not necessarily lead to quality.

One of our major assignments as specialist consultants is to do program reviews. There are five of us to review all of the programs in California, a job previously done by 24. We are using an interesting document, a child centered process for looking at quality beginning with how the student learns, what the student learns, the environment in which the student learns and the support for the instructional process. We have thus changed the monitoring system so that we look at the total education program including special education. Although it is still a generalist document, we try to use a specialist with that document who can interpret it for specialized services which they are reviewing.

One specific problem in California is the so-called delabeling of special education: if you do away with all the labels such as visually handicapped, mentally retarded, you eliminate the stigma attached to the labels. All children are now called individuals with exceptional needs and eligibility is determined according to these individual needs at the local level. There are some implications for visually handicapped. First, a visual handicap is a physical fact and we cannot do away with that label even if we wanted to. We do a disservice to our students if we do not teach them to deal with that handicap. Ken Jernegin from the National Federation of the Blind once said that the handicapped are the only minority group which do not have parents of the same minority group to teach them to deal with the discrimination that they will face in society. It is thus the school's responsibility to do this. Although we did away with the labels, we came up with four new labels to be used for recordkeeping purposes. Instead of delabeling, we relabeled.

Unfortunately, teacher credentials were also based on the new labelings. Visually handicapped were grouped with orthopedically handicapped to become physically handicapped. Therefore, all teacher preparation programs train both orthopedically handicapped and visually handicapped. Activities from a very strong coalition group led to the introduction of a bill to reestablish a separate credential for the visually handicapped. With support from every organized group in the state of California, it passed.

Delabeling also opened the flood gates for virtually any child who had a problem since it was up to the local school district to determine who was to receive special education. As the numbers in special programs increased the legislature did two things. First, they mandated that the state develop eligibility criteria and second, they set a priority of funding for severely handicapped children.

Recently Resource Spcialists have entered the scene. This generalist person is at each school and generally comes from a learning disabilities background. It is really a good concept for coordinating services. However, with the funding cuts, increasing numbers of visually handicapped children are being put into this program without the specialized assistance from an expert in the field. This is dangerous and threatening to the quality of their education. What we need now is a position paper that is child centered, and details what is special about visually handicapped students. What are their special needs? How must these needs be met? Who should be meeting these needs? Generalists tend to see our area as primarily providing "things": braille, large print, books, the specialized equipment, canes, etc. and they feel that providing these "things" is all you need to do. We have been too successful in our integration. The generalists do not realize how much work goes into the integration process.

To counteract these trends we need to educate our colleagues at all levels, even in the state department of education. Within our own profession we have the tendency to isolate ourselves as evidenced by the proliferation of organizations and the infighting among organizations. This is seen by generalists, particularly legislators, as a weakness. We need to unite and to develop coalitions. We all need to be general practitioners of sorts so that we realize our weaknesses and what can be done best by others. We cannot fight among ourselves but rather must present a united front and say that if something is not provided, we cannot do the job that needs to be done. Finally, the greatest challenge of all is the problem with morale. People are losing their sense of professionalism. This is particularly important at the local level. The teachers are having their programs cut, their caseloads increased and we need to support them and help them to take pride in what we are accomplishing. We have led the way in special education in a lot of areas. We have overcome enormous barriers and we can do that again.

## The "Generalist" Consultant

### Deborah Livingston-White, Michigan

One of my big advantages as a generalist is that I do serve in several roles within our state. I am the consultant for the learning disabled, and a regional consultant wherein I cover all disability areas for two regions. Thus, I can interject the concerns of the visually impaired and get those issues stated in forums that were never accessible before. I rely heavily on other specialists so that I know that when I speak I am speaking from as much of a data base as possible and that the concerns are presented accurately. I find myself reading everything I can about issues, equipment, concerns, teacher concerns, new methods, materials, political moves. I ask a lot of questions and I do a lot of listening. I have also been given some responsibilities in the area of professional development which is a separate unit from where I am assigned. In the needs assessment mandate of PL 94-142, the specific needs of teachers of the visually handicapped are frequently lost so that they go years and years without having their needs met unless they have the financial resources or the motivation to independently seek what it is that they need. Even with a generalist consultant at the state level, they have an opportunity to call to state those needs and we can explore ways to get answers for them.

When I became the state consultant for the visually impaired about two years ago, one of my first tasks was to become aware of existing groups and structures and to attempt to coordinate priorities of all those groups. I found approximately 18 and will describe some of them and how they can be used.

1. Colleges/universities. Faculty members are an excellent resource for consultant help and although I never seem to get an

opportunity to communicate with them as much as I would like to. I do make use of them.

2. Local education agencies and intermediate school districts. Our vast untapped group is directors of special education. Again, they are the people who review the needs assessment, and often they do not see that teachers of the visually impaired have a special need. We have attempted to communicate with them through a newsletter. They may not pick it up but once in the year but when they do, at least their mind has been opened to the special and very unique needs of the visually handicapped.

3. Regular classroom teachers. These are the ones who are getting our students and also have some special needs before the student walks into the classroom. We need to begin professional development with these teachers so that the first day that the visually impaired student enters the classroom is a better day than it has been in the past.

4. Adult groups and alumni associations. To illustrate their contribution: at Michigan State University there is the Tower Guard, an honor society of readers for the blind. We need groups such as this at all levels.

5. The media. We must use public access television, and encourage handicappers to produce their own media. Television can shape the attitudes and have a tremendous political impact.

6. The IRC for the Visually Handicapped. This resource is well described in other papers.

7. Rehabilitation Center. Last year three students under the age of 16 were admitted into our rehabilitation center on a special non-vocational project. The students had a very worthwhile experience because they are not attending our residential school and they needed additional work particularly in orientation and mobility and daily living skills.

8. A mobile unit. We received a grant through Western Michigan University to develop a mobile unit that includes orienta-

tion and mobility specialists who can go around the southwest corner of our state and conduct evaluations. The mobile unit includes a multidisciplinary evaluation team and although they do not serve our school age children specifically, they will accept referrals for evaluation when they are serving the adult population in a particular community.

9. Parent groups. We have a proliferation of groups in Michigan and one of the biggest jobs is trying to pull them all together and help them understand the political process and how priorities are established.

10. MVIP, Michigan Educators of Visually Impaired Persons. This group has no dues and includes anyone who is serving a visually impaired person. We distribute a newsletter that attempts to educate people about how the political process works, how priorities are set, and how the needs assessments are done.

In summary, being a generalist is sometimes very difficult. My objective is to develop independent functioning professionals in the field who can become leadership personnel. Only about 10 percent of my time at this point is in the field of vision so I must develop the personnel in the field so that they can get for themselves the resources they need. We find that people are hungry for information and we have attempted to develop a communication tool through our newsletter. We are also developing a directory. The most important part of the generalist consultant role is to identify all possible resources and to mobilize those resources in the best interests of educating visually handicapped pupils.

## The Commission Approach:

### Lynne Young, Delaware

Delaware probably has a statewide program about the size of your countywide programs; thus it is difficult to speak in generalizations about the commission service delivery system and its feasibility for larger states. In Delaware, the ability to accomplish something is a direct function of the size of the state and the fact that the agency, the Division for the Visually Impaired, has a virtual monopoly on services for the blind. The Division fits the old commission for the blind definition, namely, serving the visually impaired from birth through old age. It encompasses education, vocational rehabilitation, vending stands, adult services, and a sheltered workshop. Delaware has a cabinet form of government and the agency was housed under the Department of Health and Social Services with a cabinet secretary, but recent legislation changed it to a division directly under the cabinet secretary. There are five other states that have a similar administrative organization: Virginia, Connecticut, New Jersey, New Hampshire and until July of 1982, Maine. With input from my counterparts in these states, I will try to outline the pros and cons of this type of service deliverty system and attempt to point out any implications which might apply to other situations.

Several of the negative aspects of this structure center around financial considerations. It could be argued that a categorical agency is less cost effective, particularly administratively. There seems to be little doubt that as a state agency it is almost impossible to keep teachers' pay scales up with what the local districts can pay, especially with the negotiated fringe benefits. There is also the possiblity that a categorical agency might not have the financial resources of a generalized agency for fringes, such as office supplies and particularly capital outlay.

There are advantages, however. Funding at a state level does seem to be easier to obtain when it is in one package. The visibility and discreet nature that comes with being an agency for the blind is a distinct advantage when dealing with legislators and budget makers. They seem to have a far more difficult time cutting our budget and attacking the fat in our services than they do in chopping away the administrative budget of the Department of Public Instruction. Our focus and impact is, in a sense, less nebulous and easier for them to identify with, especially when special devices such as the talking calculator are taken into joint finance hearings: they love it. In looking down the road at the concept of block grants, the necessary lobbying at the state level may be easier with the identity that comes from being a total service agency. With a specific advocacy group, it is easier to relate cost of services to a specific number of students or clients.

Another distinct advantage is the ability to track a client's services from the earliest identification of an eye condition through the various stages and departments of service. Less time and administrative delay is necessary to refer from education, for instance, to vocational rehabilitation.

One of my colleagues from Connecticut says that categorical agencies force staff to be more client-centered rather than process-centered, but that there is more status and financial reward connected with processes than clients. People associated with clients tend to be looked down on by decision makers. My experience supports the first part of the statement but not the second part to any great extent.

In dealing with our state Department of Public Instruction for funding, I find that as long as I am persistent, persuasive and present on a regular basis, I can accomplish a great deal. In a real sense, I try to function almost as a member of their staff. They have had cuts too like most state departments, perhaps 50 percent in their specialist categories, so that the special education has only about half as many consultants as they had two years ago. As a result, they are very glad for the extra consultant help and input into their plans for the delivery of services. This enables me to make certain that their proposed activities are relevant to our needs. There are certain times when it is better to transfer funds to our agency and other times when it is better for the state department to control and process the funds through their procedures. We enjoy the flexibility of both systems and in a sense, have the best of both worlds. I do find I have to be visible in the state department, asking questions, learning about funding, and other possibilities; otherwise the visually impaired would often be forgotten in some of their planning.

How can this apply to you and how can it help you in a time when all of our budgets are shrinking? Several years ago we were under a lot of pressure to put the visually impaired education department under the Department of Public Instruction. We weighed all the pros and cons and decided not to. I am not sorry we made that decision because today if we were a part of the Department of Public Instruction probably only a small percentage of my time would be spent specifically on programs for the visually impaired. Instead I would be spending more time doing monitoring, program evaluation and assuming responsibility for other areas of special education. It will be interesting in a year to watch what happens in Maine where the commission was recently placed under education.

I still see my budget cut less than the others. I can protect it but only as a separate entity. Our survival now depends on how political we can teach ourselves to be, and somehow carrying a specific label of being an agency for the blind affords some protection and some flexibility.

## Maximizing the IRCs:

Julie Todd, Ohio

Many of us are learning how to utilize computers within our operations. Learning a new language in order to get them to do what we want can be extremely frustrating. You may have heard the phrase: "garbage in, garbage out," meaning if we do not plan correctly, we will not get what we want out of it. Designing a service delivery system works in much the same way. If we put time, concern, care and quality planning into designing the system, we will get quality services out. The IRCs for the Visually Handicapped can be a very useful resource in delivering this quality.

1. What to do about delivering, storing and maintaining braille, large print, and tape materials and equipment.
2. Inservice and information dissemination. Many times people in the field see the focus only on braille, large print, tape materials and equipment. If you are concerned about maximizing this resource, for parents, teachers, administrators, and students, then you need to decide what kind of information you want: the topics of interest, the target group, the frequency and involvement of public schools, the universities, the residential schools and the state department.
3. Use of volunteers. Many of the IRCs for the visually handicapped coordinate volunteer services for the staff and this mechanism is useful for coordinating the efforts of all groups involved in programs for the visually handicapped.
4. Federal quota allocation. Using the federal quota allocation efficiently is a decision made at the state level.
5. Finally, based on the foregoing concerns, the design of the system. Chart 1 lists some possible options. Decisions about the above must be made at the state level.

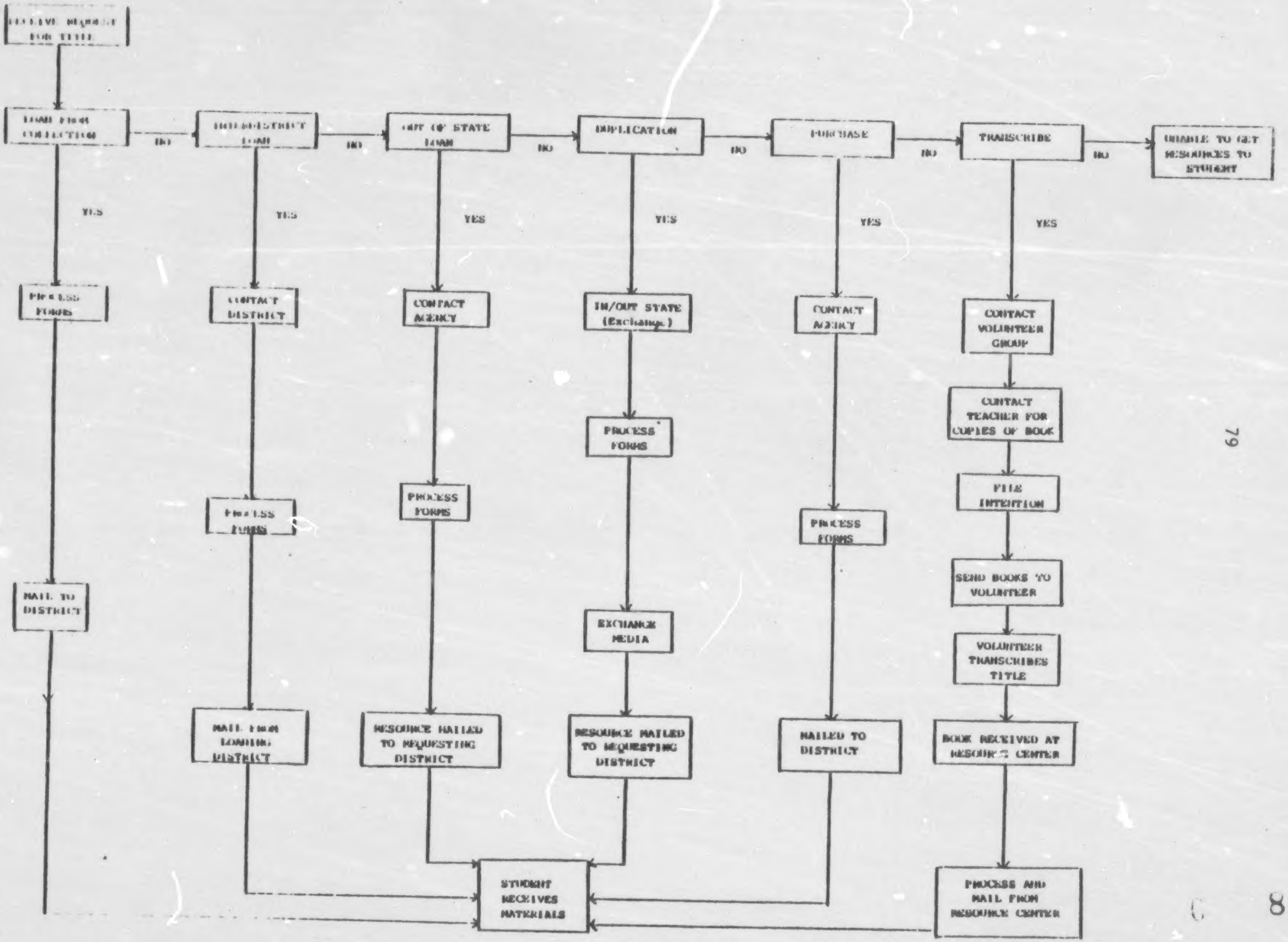
For the specialist in visually handicapped in the state department of education, the IRC for the Visually Handicapped can offer support services particularly in inservice, in disseminating information to administrators, parents and teachers; and in getting materials and equipment to the student. For the generalist, the IRC for the Visually Handicapped can be an invaluable right arm for information concerning types of training, appropriate methodologies, techniques, kinds of equipment and service. In general, the IRC for the Visually Handicapped can promote the spirit of cooperation and professionalism needed in our field, assist in increasing the numbers of resources available and in utilizing them more carefully. The resources, staff, money, and materials need not be allocated solely for the Visually Handicapped. In many states IRCs work with all low incidence areas because of the commonalities; in some states IRCs work with all areas of handicapped. Administrators concerned about the cost effectiveness of putting resources into an IRC will listen when you present figures that indicate the money saved when you re-circulate large print and braille books, braille writers, Optacons, and document what those services mean in dollar figures. All these cooperative efforts lead to more service being delivered to students, more information to parents, administrators and teachers, and greater cooperation among state level personnel, the residential schools, and the colleges/universities.

When people decide that they are going to set up an IRC for the Visually Handicapped, a good place to begin is with "things", such as braille, large print, and tape, because they are very tangible. When you can present to administrators how you have these items inventoried and tracked, then you can move on to the very important concerns about additional training and information that those students and teachers need.

It is critical that, if there is a state vision consultant, you work closely with that person in all decisions and plans for the IRC, otherwise that person may not like the system and then you will receive complaints that the IRC is taking over the job of the state vision consultant, or the IRC is communicating too much with teachers and parents. You should take care of all the issues before you start.

In order to help, we have put together several items: a directory of state IRCs for the Visually Handicapped that describes the organizational structure, the service delivery system and services offered in about 12 of the states that have IRCs; a booklet that describes the types of materials that we have developed and are willing to share with member organizations; newsletters, some training materials for teachers; manuals that tell how we run our centers; and a book that describes the braille, large print, and tape loan duplication and exchange policies that we have set up among ourselves as members of this organization. These materials are listed on the attached sheets.

# MATERIALS DELIVERY SYSTEM



## Association of Instructional Resource Centers for the Visually Handicapped

### PRODUCTS

The following products have been developed by AIRC/VH:

1) Accessing Resources for School-Age Visually Handicapped Students: A Resource Book*
2) A Directory of State Instructional Resource Centers for the Visually Handicapped
3) Selected Materials Available to State Instructional Resource Centers for the Visually Handicapped
4) State Instructional Resource Centers for the Visually Handicapped: Braille, Large Print and Tape Textbooks - Loan, Duplication and Exchange Policies

The items are being disseminated in various ways, depending upon each product's purpose.

1) Accessing Resources for School-Age Visually Handicapped Students: A Resource Book

This resource book describes how to initiate and/or expand an Instructional Resource Center for the Visually Handicapped. Requests for this product should come from state level personnel.

* Available in standard print, large print, and braille.

2) A Directory of State Instructional Resource Centers for the Visually Handicapped

The directory contains a detailed profile/overview of the Instructional Resource Centers for the Visually Handicapped in eleven states. This listing is available to anyone upon request.

3) Selected Materials Available to State Instructional Resource Centers for the Visually Handicapped

AIRC/VH members have indicated items available at little or no cost. The directory and items listed are available to AIRC/VH members only.

4) State Instructional Resource Centers for the Visually Handicapped: Braille, Large Print and Tape Textbooks - Loan, Duplication and Exchange Policies

AIRC/VH members have outlined loan, exchange and duplication policies. This product is available only to AIRC/VH members.

All requests should be addressed to the AIRC/VH President, Julie Todd, Ohio Resource Center for Low Incidence and Severely Handicapped, 470 Glenmont Avenue, Columbus, OH, 43214.

## Strategies For Action From Three Perspectives

### Power of Parents: Lee Robinson, Texas

In the early frontier days in the U.S. we had a very diverse population of people who settled in little pockets here and there. Parents recruited and hired the teacher directly. The pay the teacher received was probably in whatever form the families could produce, probably room and board with the family. If those families did not like a teacher, they fired him/her. There were other subtle ways, they told you how you were doing. If they liked you, maybe you got a tender young fryer for your pot. If they did not, maybe the tough rooster. This kind of information conveyed to educators very quickly where they stood in relation to what the community wanted taught.

Our society has become more complex but the same dynamic is there. When parents have needs or expectations from educators, they have ways of showing what those are. Remember that P.L. 94-142 and many other advances in special education were initiated by parents. The question now is raised why parents are still unhappy about the education of their handicapped children since they have attained many of their objectives.

A recent report listed some of these problem areas. Parents are not comfortable going into IEP meetings because they feel inadequate. They are afraid of reprisals against their children if they do not go with what the professionals say. They feel they are being asked to do more than they can to meet some of the procedural processes. For example, many felt they could not take off work time to attend an IEP meeting. If you put yourself in a minimum wage situation, you realize that taking off three or four hours of work becomes 2 1/2 - 5% of your monthly income, or else much needed vacation days may be reduced. Then when it takes 6 months after everyone has agreed on what the child's program should be to move the child to the new one, parents cannot understand why. Often the delay is a result of the procedural processes that districts have set up. Consequently, there are some changes that parents want and need.

Parents also have feelings of inadequacy in this whole process. They feel that other people are the experts; and they do not want to do the wrong thing for their child. This often leads them into a state of inactivity where they do nothing. Both parents and professionals need to change their behavior.

Parents can do some very specific things in order to be of help to professionals. First, they need to see your side of the problem, to see the real problems that educators face. You as a professional most often agree with parents about what resources you need in order to accomplish a certain objective, but you as a professional are sometimes forbidden to approach the people who make the decisions. In such cases, the parents need to know the facts and be told that they can do something about it. When parents go to their legislators or to the school board, they cannot go without enough information and they cannot deal with a single isolated incident. We suggest these steps: 1) Define the real problem. It may not be the surface issue. 2) Gather data about the problem, e.g., how much does it cost, how many teachers are involved, how many children. 3) Establish goals, that is, decide what is wanted. 4) Then more importantly, place them in priority, because there are always more needs than money. 5) Present the case in a reasonable manner. 6) Follow-up to see that something happens or that something results from the presentation.

Too often parents have taken two approaches either to confront people, or the local school district, or the administrator and demand changes; or they have organized themselves around a particular issue and convinced legislatures that changes in the law are needed. This latter is usually far more effective.

Parent involvement on an on-going basis is often not effective because as soon as the issue is resolved, parents return home and their purpose for existing as an organization disappears. We need to change that process for parents and to tell them that they can offer something on an on-going basis. They can 1) Offer support and emotional help to one another; 2) Lobby for quality services, where-ever they are needed; 3) Provide information to other parents, community leaders and legislators; and 4) Be of service to the field.

If we can convince them that it is important that they look beyond their own immediate situation, that there are real things they can do, then they will become those volunteers we need to work on behalf of programs for the visually impaired.

The National Association for Parents of Visually Impaired would like to see parents operate more effectively. I like to use the analogy of a mountain stream. In early spring great thaws take place in those mountains and tremendous amounts of water tumble down through the valley. If you visit those areas, you see murky black, boiling water, destructive, out of the banks doing a great deal of destruction. If you visit those streams later on during June and early July, they have cleared up and are back within their banks. In late August some of those same streams are dried up with little stagnant pools of water and backwaters here and there. I tell parents that we need to be that middle stream. We need to be consistent, forceful, moving along, but we need to be within the bounds that will work for us. Anger and broiling are hurting not just parents but also the profession. When angry parents who do not have the facts go into the legislature and give wrong information, parents lose credibility and the profession loses credibility. We need to guide parents and help them take that middle ground.

Another analogy further illustrates the situation. A little kid found a nickel and took it to the candy store. He saw all the gum drops, the licorice, carmels and looked over the popsicles in the deep-freeze. He finally decides that he would like an all day sucker. He puts the nickel in his mouth and picks one. The shopkeeper hands it to him. His eyes get big and he swallows the nickel. Unless we take care, we are going to lose that nickel the same way, because we are so enthralled with all of the different things that are going on in education; such as, the new inventions on the market for visually impaired. Unless we know what we want and use that nickel wisely, we too will lose it.

Parents have dreams for what they want their kids to have. They all want them to be geniuses. I know my kid is not a genius but I would like him to be and you have the same dreams for your kids. You have the same dreams when you have him in the classroom: You want him to be the best. All of us have those dreams and we indulge in this luxury of fantasizing that it is going to happen without anything we really do to it. That is not always true. Dreams happen because somebody makes correct choices about how to achieve those dreams. Educators need to make correct choices about sharing information with parents, about what education can and cannot do, by being honest about the process of IEP programs and what you really can and cannot do in the course of a year and whether that child is going to ultimately be a college star. Those things need to be shared with parents on an ongoing, personal basis with no surprises. Educators must share those kinds of things with parents and work with them.

Parents must make some choices too. They must choose to be involved with this process of obtaining the resources, of being of assistance in the education of their child and of helping give the information to you about what they would like to see in their child's programs. If parents do that and educators make the information available, then all children will be better served.

In closing, if our organization can be of any help to you in conveying those processes to parents, we would be more than happy to do so. We invite you to become associate members of the National Association for Parents of Visually Impaired. Because you are the leadership in this whole field, I would also encourage you to support us in other ways. You can assist us by telling parents about our organization and helping them get started. Parents and educators working together can obtain a more effective educational program for visually handicapped pupils.

### INTERAGENCY COOPERATION: Susan Spungin,
### American Foundation for the Blind

The basic impetus for collaborative inter-agency service linkages is the history of specialization common to agencies and disciplines serving handicapped individuals. In essence, the greater the degree of specialization, the greater the need for linking services. Inter-agency cooperation may be defined as a process in which two or more agencies or organizations integrate their resources to provide services to meet the individual needs of visually handicapped persons. I would expand this definition to include intergroup cooperation especially among the groups of leadership personnel in our field. Inter-agency or group collaboration is a concept that is certainly familiar to all of us, in light of participation in these Institutes where the main focus is the development of coordinated and cooperative professional preparation and programmatic plans designed to bring the commitment of quality programming for the visually handicapped one step closer to reality.

This collaborative effort in our field did not happen overnight. When I first joined the American Foundation for the Blind in 1972 as a National Consultant in Education, there had been previous sporatic attempts to ". . . organize the educational blindness field . . ." into a coordinated, concerned body in order to develop and improve educational services for our visually handicapped youngsters. These attempts were often a function of an administrative structure, such as AEVH's administrative workshop for school superintendents, or short-lived programmatic concerns and/or one person efforts, such as Mackie and Dunn's work of the 1950's with the university training programs. Sustained collaborative efforts in our field, outside of annual meetings, still remains a great issue.

Through initial AFB support, the organization of State Education Consultants for the Visually Handicapped emerged and has been sustained not only by leadership within that group, but through the efforts of University of Michigan faculty and the support of BEH, now OSE. The superintendents of residential schools for the blind have had a long history of meeting together at APH, but had not emerged as solid an organization as they are now, thanks to a relatively new leadership within that organization. Perhaps the fastest growing new organization is the Instructional Resource Centers for the Visually Handicapped, again, thanks to many of the new and not-so-new leaders from within. And finally, the unorganized organization of College and University Personnel in the Education of the Visually Handicapped, an example of a group of concerned educators, meeting over the years sporatically around immediate issues, some defined from within, such as Competency Based Teacher Education, and some imposed, such as stimulating research and research needs, both for the field at large, as well as for University personnel.

Let me take a moment to bring you up-to-date on what the Interagency and Inter-group Collaboration has accomplished during the last year. Many of you are aware of the fact that I have traveled around during this institute from group to group. This is merely a taste of what has happened:

1. Distribution of materials, regionally and nationally, such as the Handbook distributed by the IRC-VH group as well as various other newsletters from other groups;
2. Development of AAWB-AEVH-DVH collaboration for meetings, as well as becoming politically astute;
3. Continuation of in-service training across state lines, such as in the Rocky Mountain Region by the University of Northern Colorado.
4. Annual state in-service meetings extending beyond the state, such as in California, the CETVH Meeting;
5. Cooperative research efforts;

6. Outreach teacher training programs, such as the Blind/ Deaf Program at Michigan State University, reaching out to Iowa, Illinois, Ohio and Missouri for practicum experience and eventual job placements;
7. And last but far from the very least, the proposed regional plans for formulating and implementing collaborative efforts through tapping the resources of AFB.

My concern today is how we sustain and grow in this evolutionary process of collaboration that is evidenced by what you already have accomplished. With the doom and gloom articulated earlier, it would be very naive of us to assume the federal government will continue at the level of funding it has in the past four years to bring in part or in total all of you together. What we really need to ask ourselves is how really committed are we to this concept of collaborative agency organizational cooperation. Would you be here on your own personal funding? Will you be here next year? Is it peer and professional pressure that brought some of you here today regardless of funding? Or is it truly a commitment to the process and a dedication to maintaining and improving quality services for our visually handicapped students? I am aware that even with the federal support many of you, if not all of you, have made personal sacrifices to come. Was it worth it? As John Stager once said to me, "I'm not as concerned about burn-out as I am about rust-out.".

I hope I am getting under your skin a bit because I am frankly worried -- worried that our years of working as an isolated profession in the field of education may return. We learned in the previous sessions that the private sector and individuals give nearly 90% of all the money contributed in this country. How many of us thought of ourselves? We are the private sector. Will we give personally for what we believe in?

I am not only concerned about sustaining our efforts of collaborative planning in the near future but expanding it as well.

In this time of shrinking resources we must continue to be concerned with the delivery of related services. Where does rehabilitation fit in the overall social service program? What structures and linkages for collaborative planning can we build with them? Who are the consumers of our services? Happily we have heard about the potential for parent power, but what about the blind adult population? Nothing is more destructive to a united front than the omission of the support of the very population we claim to serve.

I am suggesting that we have developed the foundation for collaboration and programmatic tools for implementation, but we have barely begun. We are still talking to ourselves. I am not suggesting that we stop, but rather stretch and broaden our base of collaborative efforts throughout the blindness system and beyond. Now more than ever before, we need the force and political power that can be won through cooperative efforts within and without the blindness community.

AFB is prepared to allocate staff for coordinating efforts for future meetings and collaborative activities. You can already see this in its administration and staff participation in this institute and its plans to continue that role in the field of education. We do not have the resources at AFB enjoyed by many of you these past four years. Those must be found within each of you, the private sector, with a professional commitment. We all have been given the luxury to organize and come together. Now that the fight has just begun, let us take advantage of our communication channels and become perhaps not the squeakiest wheel in town, but the most politically astute and sophisticated in finding new arenas for resources and collaborative efforts for meeting the needs of our visually handicapped students.

We have heard suggestions and ideas from some not traditionally associated with either education or the field of visually handicapped. To what extent have we really listened to what they have said? To what extent are we willing to consider the applicability of their ideas? We have heard that we are not organized nor do we have the resources sufficient to influence those constituencies or groups that make the difference within communities or governments. We have heard that we do not utilize volunteer programs effectively and more importantly, do not seem concerned about plans for improving the quality and effectiveness of the programs we have. We have been warned that continuing to talk to each other is not the way to tap the private sector. Instead we must establish a dialogue with groups outside our field, involve the private sector at a truly participatory level within our field, develop outreach programs to explain the importance of what we are attempting to accomplish, establish influence areas among those who can help us make the difference in the future of the education of the visually handicapped.

How are we going to react to all of this? Are we going to sit back and say, "Interesting but not really applicable, we're different". "Our policies and traditions won't allow us to consider any of this." "It's not our style." Any of these responses would negate the possibilities of success. Or are we going to say "Interesting. How can we apply some of this to our situation? What is applicable and adaptable for us?" Do not take too long to think. There is no choice, there is only one answer and we better choose it fast. As in the marvelous stories about the Reverend LeRoy and the Biblical scholar, whether we crawl or run is truly in our hands. Have we a choice other than to leave here shouting in unison, "We shall overcome!"? By applying the lessons we have learned and by putting aside our differences to effectively organize, we can continue to help our visually handicapped kids, which is after all the reason we have chosen our careers.

## Strategies for Action in the 80's

### State Strategies:

### Peyton Williams, Jr., Georgia

We are living in an environment of continuing change and adversity that demands leadership. There is nothing new about this because states, state departments of education, and local school systems are accustomed to change and adversity. We cope with change daily. The questions that must be addressed as we think about Strategies for Action in the 80's are whether state and local school boards will capitalize on change by creating the proper climate for needed improvement, and whether we will convert adversity into advocacy by demonstrating leadership and bringing needed improvements in education for the visually handicapped and for all students.

The functions to be performed by state education agencies and the role of the state in the education of our youth has been the subject of a number of studies. It may be appropriate to mention again what these functions are. A review of selected literature on both the historical development and delineation of functions suggests that states should assume as their primary responsibility the following functions:

1) conducting long range planning, goal setting research and development, and evaluation;
2) identifying educational needs;
3) providing leadership in communicating educational problems and recommended solutions to the legislative and executive branch of state government and to the public;
4) assuring statewide communicative and coordinative networks;
5) equitably financing education programs;

6) developing standards and regulations for the optimal operation of educational delivery systems; and
7) providing leadership for statewide planning and development.

(Campbell, 1975; Docterman and Beshoar, 1970; Bailey, 1952; Campbell and Mazzoni, 1974; Pierce, 1973; and GAO, 1974).

I think you will agree that states have broad powers and they also have many constraints in the execution of some of this power. There is a growing realization that the educational system cannot solve all of society's problems. What we need most is a common purpose and an agreement on how to reach our mutual goals. The schools - whether residential or in a local school district - should be in the forefront of this movement.

The task will not be easy. I find considerable encouragement in the fact that, according to the most recent Gallup Poll on education, the nation's public schools rank second only to the church on the list of institutions in which the people have the most confidence. Our schools rank well ahead of the courts, local, state and national governments, labor unions, and business. To justify and capitalize on that confidence, we must all commit ourselves to an assessment of what is working and what is not and why. Parents expect the educational enterprise to prepare their children for a life in the future, not just the present and certainly not the past. The children you teach today will spend three-fourths of their lives in the 21st Century. They will live with sophisticated technology and in the most industrialized century known to mankind.

To set realistic goals and be effective, in preparing our young people, we will need of necessity to subject past assumptions to critical analysis.

State level education policy makers confront two major issues in the 1980s -- the level of funding to be provided from state and local sources for elementary and secondary education, and the degree of discretion that will be retained by local school officials if current trends in school finance continue with a decreasing percent of funds for education being provided by local sources. Federal legislative requirements of the 1970s concerning maintenance of effort and full service level for all handicapped children implicitly assume that educational revenues will remain constant. Such may not be the case during a period of decline in financial resources.

In some instances federal action has been supported with the funds necessary to carry out federal mandates, but in others addtional funds have not been provided to enable the local school district to implement the requirement. For example, local schools are not required to provide compensatory education programs in the absence of federal funding, but current federal regulations require programs for the handicapped irrespective of the level of federal funding.

Taxpayers and legislators tend to equate lower enrollments with lower taxes. If schooling costs so much per child, then fewer children should mean fewer tax dollars. A recent publication by the Education Commission of the States included a statement that bears on this issue:

> "An overall loss of several hundred students does not automatically decrease the number of teachers needed, particularly when the loss is distributed across a district or school with only one or two fewer students per classroom. The need for support personnel, secretarial and custodial services remain the same. It costs just as much to heat a building that is half full as it does to heat a full one -- fixed costs."

It is because of perceptions like this that public relations problems exist. People must be educated about this new era, but it's not easy. The idea of declining resources is foreign to Americans who link it with failure.

As you address strategies for the 80s, it seems appropriate to remember that during periods of growth, the passage of time tends to balance errors of judgement in resource allocation; in decline, time compounds this problem. Growth holds out promise for career advancements; decline protends job consolidation. Growth encourages and provides for multiple priorities; decline necessitates focusing on only a few. In varied ways, decline management will challenge the most able administrators.

Those of us in educational administration have often, in times of crisis, been casualties of retrenchment crises. We tend to be unnecessarily cautious at a time that demands some trial and error, a lot of flexibility, and perhaps bold moves into unchartered territory.

I believe that from a state perspective, the first rule in the climate we now find ourselves is not simply to tough it out or muddle through each crisis as it hits. One of the most crucial issues that I think we face today and for which we must develop refined strategies for the 80s is that of coming to grips with understanding politics and power. The politics of education are likely to become more intense and more visible. The reduced resources of an era of decline should force us to see common interests, should enhance our tolerance for different views and for cooperative strategies. It is important for us to remember that politics and power are not necessarily governed by the laws of logic, rationality, and a comprehensive view of the public good.

We must recognize the fact that it is no longer the case that educators have the exclusive competency to formulate educational policy. Defensiveness, narrowing one's vision, or waiting for someone else to provide answers for strategies or answers to our problems will not suffice in these new and different times.

If ever there was a time for long range planning in the residential school, at the local school district and the state department levels, it is now. In fiscal matters, this advice has not gone unheeded in our state and I am certain that this is true for your state.

Cooperation and coordination are two key strategies that are needed today. I believe that these ingredients that have long been recognized as essential elements for effective programming in general and special education represent the mandate for today if quality services are to be provided to visually handicapped young people and other students in our schools.

Coordination has about five major functions which relate to planning and operating programs that we would be well served to consider again.

- The identification of needs in each state for gaps in programs and services for visually handicapped students.
- The identification of resources to meet these needs.
- The identification and acknowldegement of unwarranted duplication of services.
- Collaboration with other agencies and actors who can influence change in the goal for superior services to visually handicapped children.
- The joining together of these resources in a concerted effort to meet critical unmet needs.

This may mean stepping out of our turf guarding arenas or schools. One of the major problems we face in education in general is that we spend much too much time talking to ourselves and to each other. There are other actors in this play who have leading roles and with whom we must collaborate.

For the most part, educators want to cut nothing; we insist and assume that everything is absolutely necessary; and we are reluctant to investigate what might not be necessary rather than risk the considerable heat from advocacy groups representing interests or programs that possibly should be eliminated. Unless the many people who care about our schools and handicapped children participate in this debate, it is likely that the law of the political jungle will hold sway and impede any hope that we may offer to our young people for a better life. Those who are most vocal, most organized, and best understand the accumulation and exercise of power and politics will win.

Since funding for all public services is likely to continue its downward trend, those professions and agencies serving children will be forced to look at what they are doing in relation to one another reduce duplication, work on cooperative ventures, and generally address a basic question of the role and scope of our service delivery system in this age of declining resources. Reduced resources will call for a renewed emphasis on planning and coordination, originating at the local level and the state level.

To work our way through these different and difficult times will require strategies that will call forth leadership of an uncommon stamp. This leadership must come from many quarters. While educators must reach out to other disciplines and professions for help, the final responsibility rests with men and women who claim such leadership in the education of the visually impaired. Your task will not be easy.

The education leaders who will steer us through this era of decline must be men and women who have the courage to challenge old and powerful assumptions about residential schools for the visually handicapped and schooling in general, who will be willing to tax their creativity to the limit to find acceptable solutions to these difficult problems, who will be secure enough as professionals to seek help from others outside the profession, who can combine the intellectual tools of the educator and the professional manager, and who can understand the limitations and possibilities of leadership in an educated democracy.

Perhaps the single most important requirement of all of us who will be actors in these new times is that we not become REACTORS who cut a steady path of retreat, but rather leaders who will see in this new era for education, new and positive possibilities.

For those of you from residential schools, your public relations efforts should expand beyond the walls of your schools and your alumni to every corner of your state. According to a recent publication, $60,000,000 was spent for the operation of residential schools. This represents an average of about 2.5 million dollars per school with an average enrollment of about 123 students and, according to figures that I have, a national cost of about $21,000 per student. Three-fourths of these funds were for personnel and support services. Did this make a difference for visually handicapped graduates last year? Where are they now? Are they gainfully employed? Are they in post-secondary schools, colleges? Will they be among those included in an article in your program publication that shows the vast majority of handicapped young adults on Social Security insurance, welfare, unemployed, etc.? What kind of follow-up data can you produce on your graduates? Is the residential school needed? If so, why? What are you doing that is valuable? Does the public know? Are you convinced that what you are doing is worthwhile? Is your instructional program geared to meet the technological advances that will render your graduates ready for the world of work - or will what you have taught be of little value to them in the job market?

A re-appraisal of the residential school is crucial. A re-examination of goals and priorities is a strategy that we should employ to determine whether each educational activity remains desirable, workable, and to eliminate any which are not. The challenge of identifying and redirecting the resources required to do this will test the responsiveness of leadership to the changing political and economic climate existing today.

Dr. Hugh Pace, who is a member of your group, conducted an interesting, significant and revealing study sometime ago on the future functions of residential schools for the blind by using the Delphi Technique with major actors in education. It appears to me that much of the data generated by this significant study is especially relevant today and that those of us associated with programming, either directly or at the managerial level for the blind, would be well served to review this important piece of research.

The Delphi Technique - or a forecasting methodology - could prove to be a valuable planning step in designing strategies for the 80s. The use of forecasting methods and techniques can help organizations such as schools, cope more effectively with forces impinging upon their environments.

In Georgia, our three superintendents of the schools for the deaf and the blind have done fine things in making our schools responsive - not only responsive first to our students, but to the community and to the state.

The residential school for the blind has a tremendous opportunity to assert itself as the official resource center for the visually impaired in each state. The residential school, I firmly believe, ought to be doing more than just teaching the children enrolled. It ought to be used for the benefit of all of the programs for visually handicapped statewide.

The real experts on educating visually handicapped students are in residential schools for the blind. The state department consultants are valuable people, but because of the burdens of paper work, keeping track of children and funds, they, in all too many instances, do not have the time nor is the staffing significant enough for them to provide quality technical assistance to teachers with visually handicapped children in public schools.

Our strategies for the 80s should, in my opinion, explore alternatives to:

1) establish within the existing staffing patterns of the residential school provisions for technical assistance to parents of infant visually handicapped students;
2) provide leadership in developing a comprehensive plan for services for visually handicapped students in the state which would entail a cooperative planning endeavor by all agencies serving the visually handicapped and extend beyond the written agreements now in existence with vocational rehabilitation and other agencies;
3) help lead the way in refining and devising a system of securing accurate data of the number of visually handicapped students in each state;
4) join in a cooperative effort with colleges and universities offering teacher preparation programs for the visually handicapped in opening up the schools for research and inservice training for teachers and prospective teachers;
5) somewhere along the way implement a strategy for helping to raise our expectational level for handicapped persons. Research continues to confirm the significance of the teacher in the area of student achievement; and
6) involve visually handicapped persons in assessing your program offerings and inviting their opinions on those things that have been most helpful to them in becoming productive citizens.

One of the strategies from my vantage point for the 80s is that we should call attention to problem areas.

We are told that most teachers are not prepared to deal with the multiply handicapped population with their attendant medical needs. Present staffing patterns and funding levels are also inadequate for these populations. Somehow we must find a way to get this message across to decision makers if what is reflected in the literature is true.

Colleges and universities must realize that if they are only willing to "tell" our prospective teachers but not show them how to implement techniques for working with the handicapped, then they will be engaged in half measures which will avail us nothing. We can no long require students to engage in practices to bring about child change if we cannot demonstrate ourselves that the techniques are viable with special populations. Referring to the literature will not develop operational teaching guides for today's prospective teachers. If those of you at the college and university level are not willing to venture into demonstrating a model, you cannot expect your students to be risk-takers and open to change when they, in their turn, enter the field.

Teacher education personnel must join forces with state departments and others in realizing that any chance to improve quality services to visually handicapped students, whether in public schools or residential schools must rest with retraining and improving our aging teaching and administrative staffs. Waiting for new blood to do the job seems statistically and logically unwarranted. It will take extraordinary incentives not now in existence to get America's best young talent to enter the field of education in the face of better job opportunities elsewhere.

I do hope that you will consider as a strategy ways to alter the mental attitudes of those who are forced to work in an environment of decline and retrenchment. Our teachers and support personnel today are under great stress. We must find ways to lessen tension and provide the reassurance and encouragement that they so richly deserve. For teachers, rewards are few and morale is low. The best teachers are bailing out, and the supply of good recruits is drying up. They have a sense of powerlessness over their own fate. We must develop strategies to combat this.

And finally, I realize that the following remarks may be controversial, but I feel compelled to comment even in the absence of having all of the data I need. Hopefully, some progress can be made in this area at the state level.

At some point, educators like you will probably need to help bring together persons who represent different view points on associational and related matters pertaining to the visually handicapped. We may say that some people are off target in their views and the positions they take; they may be, but this is America and we do have democracy prevailing. Individuals and especially handicapped persons, do have a way of influencing public opinion and especially in the absence of the general public knowing all of the ramifications and philosophical differences.

When people do not have access, when they perceive or see elitism prevailing, when they see no one who can identify with those who are, as I put it, "where the rubber meets the road", articulating their needs, unrest and discontent cannot be averted. I endorse no official view--however, I sense a need to call for a spirit of tolerance in this very basic area of understanding and especially if you are truly committed to providing quality services and opening doors for productiveness for persons who are visually handicapped. A house divided cannot stand.

Our mutual willingness to collaborate for and about quality education for special populations is more important now than ever. Our central sense of direction may disintegrate unless we work together to continue and enhance the special and general qualities of education that many of you have worked so hard to achieve for the visually handicapped.

I wish to close with a poem written by Robert J. Smithdas. During this period, I believe it has a message of inspiration for all of us.

### MIDWINTER

The bird that sings in winter holds
  my heart;
Surely it must take courage to face
  the day
Singing a brilliant song when the
  world is gray
And cold, and seemingly bereft of art.

April is still too far away for me
To dream of lilacs under a pale spring
  sky
But if a bird can sing from a blackened
  tree
With such conviction, then surely so can I!

- Robert J. Smithdas

## V

## Summary

This section summarizes the actions recommended by a panel of participants during the final session based on their attendance at the Institute.

Five major suggestions were given for becoming politically involved:

1) It is very important to get members of the coalition, including the parents and the clients as well as professional paid workers, to be involved in the political process. Politicians are fairly paranoid. They are really afraid of us. We shouldn't be afraid of them. None of them can get elected by the votes of themselves and their own family members and they are completely dependent on us. It is particularly important with candidates to invite them to your organizations and ask them to come and speak.

2) The best contact with politicians is having people who know the candidate, whom the candidate likes, and whose opinions the candidates or elected officials value, make personal contacts and interact with that individual. Staff people are every bit as important as the elected official as their organizations get bigger and more complicated. But you must contact both the elected official and the staff person who deals with your area of interest.

3) The best way to lobby is to let your client group do the lobbying for you. Think of politicians as regular flesh and blood people who do not have enough time to know much of anything about what you are doing; you must find a way to package it in such a way that will sell it to them. The best way to do this is to let the parents and their children speak for you.

4) Above all else be positive and don't fight each other. Mutual support adds to power; conflict subtracts from it. If you are fighting each other, you are subtracting from your total punch; and if you are all working closer together you are certainly adding to it.

5) Declare victories to the public. Nobody likes to back a loser. Tell them the good things that you are getting done but be discreet about addressing the weaknesses in your program. Take a fairly active posture and be assured that over the next year or two we will win back most of what we lost.

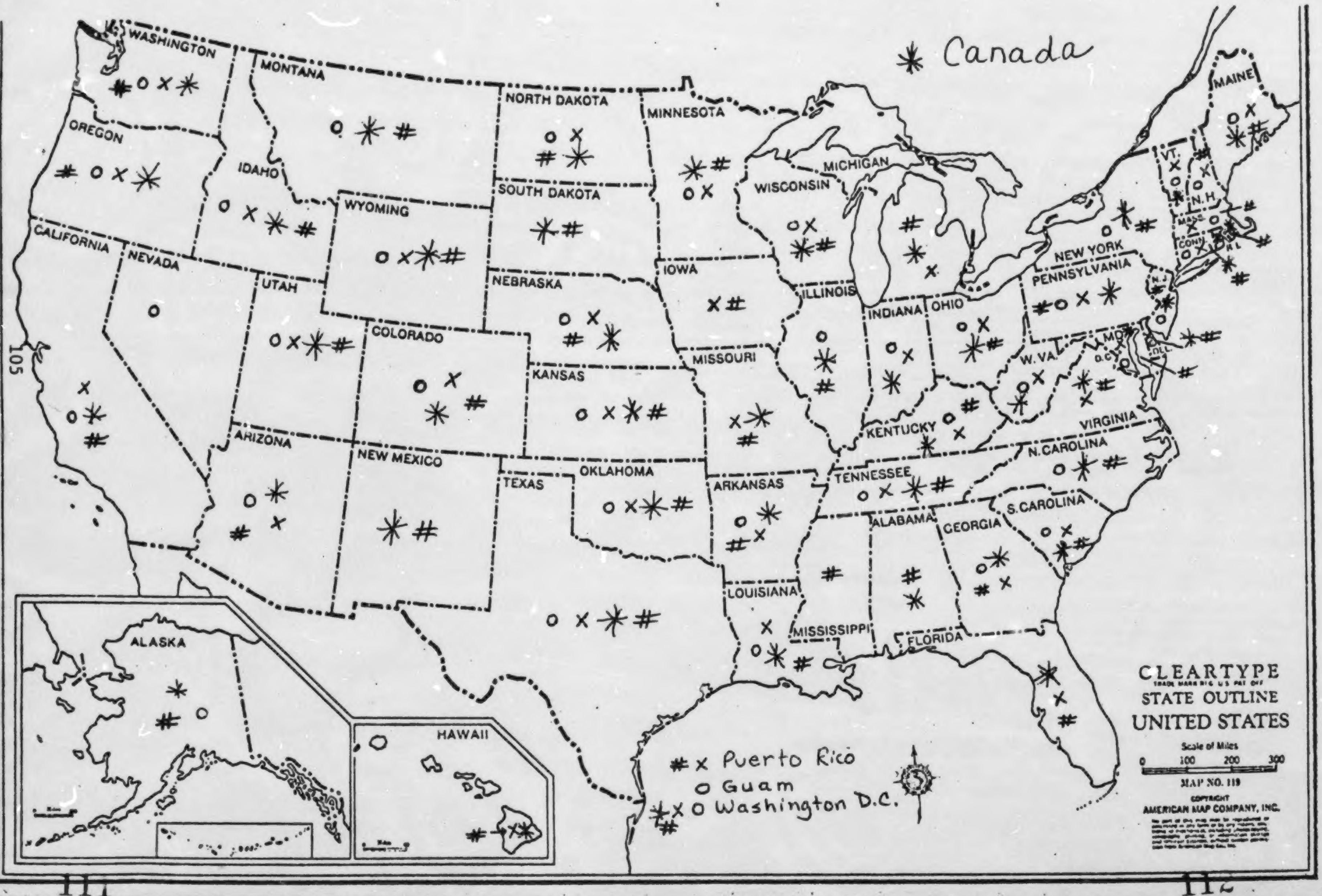
Two general suggestions included:

1. Do not hide behind the excuse of small numbers. The fact that you are a low incidence population is not necessarily the issue. The critical factor is how you organize and how effective you can become through that organization.

2. Do not neglect the multiply handicapped in your thinking and planning. They are a growing segment of the population now being served and their special needs must also be recognized.

| | |
|---|---|
| # | 1982 PARTICIPANTS |
| ✳ | 1981 PARTICIPANTS |
| X | 1980 PARTICIPANTS |
| O | 1979 PARTICIPANTS |

Chart 2: ATTENDEES OF THE SPECIAL STUDY INSTITUTES FOR LEADERSHIP PERSONNEL IN THE EDUCATION OF THE VISUALLY HANDICAPPED



Appendix B

## 1982 SPECIAL STUDY INSTITUTE PARTICIPANTS
## BY STATE

### ALABAMA

Brenda Garrett
Ron Garrett

### ALASKA

Jane Brodie

### ARIZONA

Bess D. Kaplan
Kenneth Rislov
Noel E. Stephens
Ivan Terzieff

### ARKANSAS

Bob Brasher
Dan Head

### CALIFORNIA

Sally Deitz
Margo Dronek
Jack Hazekamp
Sally Mangold
Rose-Marie Swallow
Pete Wurzburger

### COLORADO

Judy Anderson-Wright
Robert T. Dawson
Grace Napier
W. Buck Schrotberger

### CONNECTICUT

Lars Guldager
Robert E. Long
Rebecca D. McGlamery

### DELAWARE

Marion Levenberg
J. Lynne Young

### DISTRICT OF COLUMBIA

Jacqueline M. Dickerson

### FLORIDA

William F. Benchik
Laura Cooper Brown
Suzanne A. Dalton
John Gunia
Gideon Jones
Marie H. Kovecsi
Paul J. Lewis
Rosemary H. Stokes

### GEORGIA

Pat Carpenter
Isabella C. Holmes
Richard E. Hyer, Jr.

### GUAM

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### HAWAII

Leatrice Chee
Penelope Tom

### IDAHO

Michael F. Anderson
Ron Darcy
George M. Hoyle

### ILLINOIS

Toni Henize
Gaylen Kapperman
Jim Meeks
Phyllis J. O'Connor
Alice M. Post
Evelyn Rex
Richard G. Umsted

### INDIANA

- -

### IOWA

Gail Sullivan-Fleig

### KANSAS

Harold L. Hodges
Hugh A. Pace

### KENTUCKY

Hilda Caton
Julia French
Jan Moseley
Betty Wommack

### LOUISIANA

Richard Day

### MAINE

David P. Dorr

### MARYLAND

Ann T. Bertsch
Loretta McGraw
Rosemary O'Brien
J. Deborah Sterrett
Richard L. Welsh

### MASSACHUSETTS

Sherrill Butterfield
Robert Dantona
Richard Jackson
Mary M. Keefe
Karen Ross
John D. Stager
Charles C. Woodcock

### MICHIGAN

Lou Alonso
Kenneth A. Hanninen
Deborah J. Livingston-White
Frank Wawrzaszek

### MINNESOTA

Carl T. Johnson
Marilyn Sorensen

### MISSISSIPPI

R.C. Benton

### MISSOURI

Louis M. Tutt

### MONTANA

Bob Deming

### NEBRASKA

Dewaine Alcorn
Donna McKinley
Jerry Regler

### NEVADA

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### NEW HAMPSHIRE

William Finn

### NEW JERSEY

Joan B. Chase
Vahram Kashmanian
Pete Rossi

### NEW MEXICO

Stanley E. Bourgeault
Bill Davis
Barbara McDonald

### NEW YORK

Zita Auerbach
Robert A. Bowers
Nancy W. Bryant
Kathleen Mary Huebner
Francis Irzyk
Mary Ann Lang
Rita Madden
Frank Migliorelli
Ruth Migliorelli
Rosanne K. Silberman

### NORTH CAROLINA

Samuel J. Cole
Lloyd Wimberley
Alana M. Zambone-Ashley

### NORTH DAKOTA

Charles R. Borchert
Ruth Hoglund
Myrna Olson

### OHIO

Dennis L. Holmes
Ruth Lindecker
Julie Todd
Marjorie E. Ward

### OKLAHOMA

R.M. Casey

### OREGON

Donald H. Edwards
Sheldon Maron
Ray S. Myers
Linda M. Schmoldt

### PANAMA

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### PENNSYLVANIA

Richard Dalton
Jane Erin
Kay Ferrell
Verna Hart
Susan M. Kershman
Ilene L.S. Kurfeerst
Jeanne Leiper
Elinor Long
Albert K. Mastantuono
Mary W. Moore
Ralph L. Peabody
Annette L. Rich
Ben H. Williams

### PUERTO RICO

Celsa Alonso
Awilda Nunez
Cesar Rosario
Jose R. Santana
Felix Cortes
Raphael Mendez

### RHODE ISLAND

George P. Barros

### SOUTH CAROLINA

Baron Holmes
Ouida Fae Morris
Mary C. Powers

### SOUTH DAKOTA

Charles B. Boyer

### TENNESSEE

Gary Coker
Randall K. Harley
Everett Hill

### TEXAS

Natalie C. Barraga
William Bryan
Anne L. Corn
Rita Livingston
William H. Miller
Chuck Russell
Virginia Sowell
Gloria Zimmerman

### UTAH

Robert W. Bischoff
J. Wayne Noble

### VERMONT

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## VIRGINIA

Philip A. Bellefleur
Julie Jones
Elizabeth W. Lewis
Mary E. McManus
Kathleen Megivern
Michael D. Orlansky
Glen R. Slonneger, Jr.
Don L. Walker

## WASHINGTON

Daniel Ludewick
Roy J. Brothers

## WEST VIRGINIA

--

## WISCONSIN

Bill English
Andrew Papineau

## WYOMING

Robert E. Jackson

## U.S. OFFICE OF EDUCATION

Richard R. Champion
Josephine L. Taylor

## AMERICAN FOUNDATION FOR THE BLIND

Oriean Catledge
Dena Gruman
Eileen Hancock
Dena Jaffe
Gerald Miller
Ed Ruch
Judy Scott
Susan Spungin
Carolyn Weihl
Marion Wurster

## AMERICAN PRINTING HOUSE FOR THE BLIND

June E. Morris
Carson Nolan

## SPEAKERS

Joseph Ballard, CEC
Irwin Brod, AFB
Kenneth W. Jones, Human Resource Development U of M
Cheryl Kinsey, Subcommittee on Select Education
Stephen H. McCurley, VOLUNTEER
Sam Negrin, AFB
Lee Robinson, NAPVI
Irving Schloss, AFB
William Wilkin, Former Executive Director, NASBE
Peyton Williams, Georgia Department of Education

## UNIVERSITY OF MICHIGAN

Geraldine Scholl
Rivka Greenberg
Ida Holman
Jonathan McIntire
Glenda Radine
Martha Sweigert

TOTAL: 193 participants

# Appendix C

## *RELATED MEETINGS AND OTHER EVENTS*

*(Rooms will be announced)*

### *Tuesday & Wednesday, February 16-17, 1982*

| | |
|---|---|
| *1:00 p.m.* | *AEVH NATIONAL BOARD OF DIRECTORS MEETING*<br>*AEVH Executive Office*<br>*206 North Washington Street*<br>*Alexandria, Virginia 22314* |

### *Thursday, February 18, 1982*

| | |
|---|---|
| *1:00-3:00 p.m.* | *ASSOCIATION FOR INSTRUCTIONAL RESOURCE CENTERS FOR THE VISUALLY HANDICAPPED MEETING* |
| *2:00 p.m.* | *COUNCIL OF EXECUTIVES OF AMERICAN RESIDENTIAL SCHOOLS FOR THE VISUALLY HANDICAPPED MEETING* |
| *2:30 p.m.* | *COLLEGE/UNIVERSITY PERSONNEL MEETING* |
| *3:00 p.m.* | *STATE EDUCATION CONSULTANTS FOR THE VISUALLY HANDICAPPED MEETING* |

### *Friday, February 19, 1982*

| | |
|---|---|
| *p.m.* | *LEAVE FOR TOUR OF CEC IN RESTON*<br>*Departure time: 12:15 p.m.*<br>*Return at hotel: 4:15 p.m.*<br>*Cost for lunch: $3-4 per person*<br>*No cost for transportation* |

### *Saturday, February 20, 1982*

| | |
|---|---|
| *4:30-6:00 p.m.* | *DVH BOARD MEETING* |

## Leadership Personnel in the Education of the Visually Handicapped

## Cooperation for Quality Services in a Period of Declining Resources

### SPECIAL STUDY INSTITUTE

Capitol Holiday Inn
Washington, D.C.
February 18-21, 1982

### AGENDA

**Thursday, February 18, 1982**

| | |
|---|---|
| Noon-7:30 p.m. | Exhibits - Clark Room<br>Time available for organizations to meet |
| 4:00-5:30 p.m. | No Host, Social Hour - Lewis Room |
| 5:30 p.m. | Dinner on your own |
| 7:00 p.m. | Registration - Clark Room |
| 7:30 p.m. | General Session - Clark Room<br>Presiding: Julie Todd, Ohio<br>Introduction of Participants<br>Greetings: Josephine L. Taylor<br>Update on Current and Projected Activities of the Project: Geraldine Scholl<br>Plan of the Institute: Jonathan McIntire<br>Topic: The Realities of the Future<br>Panel: Special Education Legislation: Joseph Ballard, Council for Exceptional Children<br>Categorical Legislation: Irving Schloss, American Foundation for the Blind<br>State Funding Perspective: William Wilkin, Former Executive Director of the National Association of State Boards of Education<br>Response: Jack Hazekamp, SECVH<br>Hugh Pace, CEARSVH<br>Rosanne Silberman, C/U<br>Julie Todd, AIRC/VH |

## AGENDA

Friday, February 19, 1982

| | |
|---|---|
| 8:00 a.m. | Registration |
| 9:00 a.m. | General Session - Clark Room<br>Presiding: Hugh Pace, Kansas<br>Topic: Creative Options for Quality Service Delivery<br>Panel: Tapping into Volunteerism: Stephen H. McCurley, VOLUNTEER: The National Center for Citizen Involvement<br>Tapping the Private Sector: Irwin Brod, AFB |
| 10:30 a.m. | General Session, cont.<br>Topic: Strategies for Service Delivery<br>Panel: The "Specialist" Consultant: Jack Hazekamp, California<br>The "Generalist" Consultant: Deborah J. Livingston-White, Michigan<br>The Commission Approach: Lynne Young, Delaware<br>Maximizing the IRCs: Julie Todd, Ohio |
| 11:45 a.m. | Regional Groups: Brief get-together to review activities during the past year and discuss plans for further cooperation |
| p.m. | Free for regional meetings, visits to OSE, CEC, AEVH, etc. |

## *AGENDA*

*Saturday, February 20, 1982*

| | |
|---|---|
| 9:00 a.m. | General Session - Clark Room<br>Presiding: Robert Bowers, New York<br>Topic: Professionals' Responsibility for Advocacy<br>Speaker: Sam Negrin, AFB |
| 10:30 a.m. | Regional Group Meetings: Develop an IEP for improving the educational program for visually handicapped children in the region. Include goals, specific objectives and timelines for achieving them, resources needed and how they will be obtained, and evaluation. |
| 1:30 p.m. | General Session - Clark Room<br>Presiding: Jack Hazekamp, California<br>Topic: Strategies for Action in the '80s<br>Panel: Power of Parents: Lee Robinson, NAPVI<br>Interagency Cooperation: Susan J. Spungin, AFB<br>State Strategies: Peyton Williams, Jr., Georgia |
| 3:00 p.m. | Regional Group Meetings, Cont. |
| 7:30-9:30 p.m. | Optional Workshop: Management of Stress/ Burnout - Clark Room |

## AGENDA

Sunday, February 21, 1982

| | |
|---|---|
| 9:30 a.m. | General Session - Clark Room<br>Presiding: Geraldine Scholl<br>Topic: From the Legislator's Point of View<br>Speaker: Cheryl Kinsey, Staff Member, House Select Sub-Committee on Education, Washington, D.C. |
| 11:00 a.m. | Free for packing, check-out, etc. |
| 1:00 p.m. | Buffet - Lewis Room<br>Presiding: Josephine L. Taylor<br>Summary of Regional Group Discussions: Jonathan McIntire<br>Topic: What Does All This Mean: Next Steps<br>Speaker: Phil Hatlen, California |
| 3:00 p.m. | Adjourn |

SAFE JOURNEY HOME

# IEP FOR NATIONAL PROGRAM IMPROVEMENT

**Goal:** *Establish formal national network among all national interest groups, associations, and organizations to provide: Data maintenance, research, advocacy, program improvement, et al.*

| Specific Objectives | Activities | Time Line | Resources Needed and How Obtained | Evaluation |
|---|---|---|---|---|
| Establish a formal national network (coalition) among the associations, organizations, et al. interested in addressing national needs in the education for the visually handicapped<br>- advocacy<br>- data management<br>- program/funding development | 1. Explore possible national agencies to coordinate (assist) this national network<br>1. CEC<br>2. AFB<br>3. APH<br>4. a university<br>5. NASDSE<br>6. NFB<br>7. IRCs<br>8. the Alliance | (May 1982)<br>McIntire/Silberman<br>Scholl/Taylor<br>Scholl/Taylor<br>Scholl/Taylor<br>Todd<br>?<br>Todd/Hazekamp | 1. Need 2 or 3 people in a national position to approach different agencies for establishing this network<br>- Jo Taylor<br>- Gerry Scholl<br>2. Time<br>3. Facilitators of SSI to spearhead this in initial steps | At APH annual meeting, analysis of what is accomplished by the associations |
|  | 2. To identify and secure a funding mechanism to support network activities | (May-October 1982) | 1. Time and energy of the national agency coordinating the network<br>2. Submission of a proposal to receive a grant<br>3. Research potential funding sources<br>- AFB<br>- NASDSE<br>- Foundations |  |

## IEP FOR NATIONAL PROGRAM IMPROVEMENT

**Goal:** *Establish formal national network among all national interest groups, associations, and organizations to provide: Data maintenance, research, advocacy, program improvement, et al.*

| Specific Objectives | Activities | Time Line | Resources Needed and How Obtained | Evaluation |
|---|---|---|---|---|
| | | | *- APH "in kind" donation*<br>*- national Lions*<br>*- American Association of Ophthalmology*<br>*- dues from state and national associations*<br>*4. Develop preliminary cost projections*<br>*- for network development*<br>*- for network maintenance*<br>*5. Time and energy of association officers and other key individuals* | |
| | *3. To "specifically define" what the network's scope and function will be* | *(April 1982)* | *1. A working committee to gather information and develop network parameters*<br>*Committee to be representative of:*<br>*- state vision consultants* | |

## IEP FOR NATIONAL PROGRAM IMPROVEMENT

**Goal:** *Establish formal national network among all national interest groups, associations, and organizations to provide: Data maintenance, research, advocacy, program improvement, et al.*

| Specific Objectives | Activities | Time Line | Resources Needed and How Obtained | Evaluation |
|---|---|---|---|---|
| | | | *- Council of Executives of American Residential Schools for the Visually Handicapped*<br>*- IRCVHs*<br>*- College/University*<br>*- DVH*<br>*- Alliance*<br>*- NFB*<br>*2. An author for the product of the Committee--the network description*<br>*3. Preliminary funding for Committee work*<br>*4. Computer availability*<br>*5. Creativity* | |
| | *4. Develop a mechanism to remove any conflicts that will exist between and among the groups* | *(October 1982)* | *1. Strong leadership*<br>*2. Clear, acceptable network goals, objectives, and parameters* | |

## IEP FOR NATIONAL PROGRAM IMPROVEMENT

**Goal:** *Establish formal national network among all national interest groups, associations, and organizations to provide: Data maintenance, research, advocacy, program improvement, et al.*

| **Specific Objectives** | **Activities** | **Time Line** | **Resources Needed and How Obtained** | **Evaluation** |
|---|---|---|---|---|
| | | | *3. Creative, nonbiased management and coordination* | |
| | *5. Development of a computerized information system for information control and storage. Examples of data to be managed:*<br>*student data*<br>*- residential school population*<br>*- state populations*<br>*- age range*<br>*- vision impairment*<br>*- program serving*<br>*- follow-up long-term*<br>*national synchronized access to*<br>*- materials and equipment*<br>*- vision assessment*<br>*professional staff data*<br>*- teachers in states-programs-districts*<br>*- competencies they have* | | | |

## IEP FOR NATIONAL PROGRAM IMPROVEMENT

**Goal:** *Establish formal national network among all national interest groups, associations, and organizations to provide: Data maintenance, research, advocacy, program improvement, et al.*

| Specific Objectives | Activities | Time Line | Resources Needed and How Obtained | Evaluation |
|---|---|---|---|---|
| | *- salaries*<br>*- teacher/pupil ratios*<br>*- personnel projections*<br>*research done*<br>*funding sources*<br>*talent bank*<br>*employment statistics*<br>*program locations*<br>*- strengths*<br>*- contact people*<br>*- addresses*<br>*RFPs from federal agencies* | | | |

## IEP FOR REGIONAL PROGRAM IMPROVEMENT

Goal:

| Specific Objectives | Activities | Time Line | Resources Needed and How Obtained | Evaluation |
|---|---|---|---|---|
| *In order to facilitate rapid communication of current needs and projects within the region, a bimonthly information fact sheet will be established* | *Each participant at the regional workshop will submit an information update every two months in the following format:*<br>*Name, Institution, Tel. #*<br>*Information needed re:*<br>*1.*<br>*2.*<br>*3.*<br>*etc.*<br>*Current projects:*<br>*1.*<br>*2.*<br>*3.*<br>*etc.*<br>*Update of information will be compiled by Jerry Miller, the regional consultant for AFB, and mained to each of the regional conference participants* | *March: Notice sent by Miller to participants indicating deadline for first submission*<br>*April: First fact sheet sent out*<br>*April: Tickler mechanism set in place for continuation of fact sheet submissions and mailings* | *Commitment from J. Miller of AFB*<br>*Commitment from each participant* | *April 1983: Request by AFB for evaluation by participants* |

## IEP FOR REGIONAL PROGRAM IMPROVEMENT

**Goal:**

| Specific Objectives | Activities | Time Line | Resources Needed and How Obtained | Evaluation |
|---|---|---|---|---|
| *1. To disseminate personnel preparation program information on regions* | *AFB file/personal contacts* | | *AFB - Dena's file* | |
| *2. To assess regional needs for university services* | *1. Develop instrument for needs assessments* | | *a. university personnel* | |
| | *2. Disseminate instrument* | | *b. residential school, state consultant* | |
| *- Newsletter for region* | *Needs assessment to determine format and audience* | | *Ed Ruch/AFB regional consultant* | |
| *3. Debunk myth of teacher oversupply* | *1. Publicize openings* | | *IMCD personnel with closer look, etc.*<br>*JVIB* | |
| *4. Develop a series of regional inservice training programs for generic supervision/psychologists* | *1. Ask AFB to develop with us* | | *AFB* | |
| | *2. Advisory committee* | | *Ohio/host residential school* | |
| | *3. Audience - generic; supervisors and psychologists* | | | |
| | *4. Debunk Perkins/Binet myth (false scores obtained)* | | *APH (write to Nolan)* | |

# IEP FOR REGIONAL PROGRAM IMPROVEMENT

**Goal:**

| Specific Objectives | Activities | Time Line | Resources Needed and How Obtained | Evaluation |
|---|---|---|---|---|
| *5. Develop and improve regional preschool, mandates and programs* | *1. Use AFB national consultant in preschool to collect data on needs and innovative programs* | | *AFB*<br>*Residential schools* | |
| | *2. Use residential school personnel and state consultants* | | *CEC - PAN* | |
| | *3. Support/expand/develop parent groups* | | *closer look* | |
| | *4. Ongoing child find efforts* | | | |
| *6. Develop and improve prevocational and vocational programs (both visually impaired and multihandicapped)* | *1. Disseminate needs and information* | | *AFB*<br>*Hank Stern/Dena*<br>*Employment education* | |
| | *2. Regional career days for students (include adult program personnel)* | | *University/residential program*<br>*Vocational rehabilitation* | |

## IEP FOR REGIONAL PROGRAM IMPROVEMENT

**Goal:** *Develop and implement a political/professional/social action network*

| Specific Objectives | Activities | Time Line | Resources Needed and How Obtained | Evaluation |
|---|---|---|---|---|
| 1. To identify and develop a communication system | 1. Contact all professional organizations regarding existing communication vehicles and establish a system where none exists | March 15, 1982 | State consultants<br>C/U<br>AIRCs<br>Residential schools<br>IRC<br>AFB<br>NFB<br>AEVH<br>ICEC<br>NAPVI<br>ACB<br>CCLV<br>Blinded Vetrans<br>AAWB<br>NASDSE<br>NASBE<br>APH<br>State Chief School Officers<br>Lions Clubs, etc. | Quantify information output |
| 2. To identify contact persons within the system | See Objective 1. | See Objective 1. | See Objective 1. | See Objective 1. |

## IEP FOR REGIONAL PROGRAM IMPROVEMENT

**Goal:** *Full continuum for service delivery to visually impaired students*

| Specific Objectives | Activities | Time Line | Resources Needed and How Obtained | Evaluation |
|---|---|---|---|---|
| A 1. *To identify students needing services* | 1. *Collect demographic data*<br>2. *Describe population* | *To be determined* | *To be determined* | *To be determined* |
| 2. *To maintain qualified personnel to serve visually impaired students* | | *To be determined* | *To be determined* | *To be determined* |
| 3. *To strengthen the residential school's place in the continuum* | 1. *Centralize evaluation services*<br>2. *Make resources available to field*<br>3. *Provide short-term training to visually impaired students for specific skills (i.e., summer; 2 years)* | | | |
| 4. *To provide professional development to regular classroom teachers* | 1. *Involve regular classroom teachers in state institute*<br>2. *Involve university programs in state institute* | | | |

## IEP FOR REGIONAL PROGRAM IMPROVEMENT

**Goal:** *Full continuum of service delivery to visually impaired students*

| Specific Objectives | Activities | Time Line | Resources Needed and How Obtained | Evaluation |
|---|---|---|---|---|
| 5. *To assess quality of programs* | 1. *Implement program assessment (compliance and quality)*<br>2. *Require all residential schools to acquire NAC accreditation* | | | |
| 6. *To provide training to enable personnel to serve multihandicapped visually impaired students* | | | | |
| 7. *Determine teachers' function/role in the continuum (i.e., state school, LEA classroom, T.C., resource room)* | *To be determined* | *To be determined* | *To be determined* | *To be determined* |
| B 1. *To maintain quality preparation of teachers* | 1. *Project teacher needs over next 3 years (based on child count, census, duplicated count, referrals, etc. --present number of teachers, state consultants, large programs/superintendents, IMC, etc.* | *December 1982 and maintained* | *To be determined* | *To be determined* |

## IEP FOR REGIONAL PROGRAM IMPROVEMENT

**Goal:** *Full continuum for service delivery to visually impaired students*

| Specific Objectives | Activities | Time Line | Resources Needed and How Obtained | Evaluation |
|---|---|---|---|---|
| | *2. Identify potential training sites/stations (recruitment, internships, observation, inservice, cooperative coursework* | | | |
| | *3, Establish field support for maintaining standards of training programs (advisory committee, etc.)* | | | |
| | *4. Develop skills for teacher trainers to conduct inservice assistance within local schools* | | | |
| | *5. Negotiate long-term inservice to provide ongoing communication between providers and teachers* | | | |
| | *6. Interstate agreements* | | | |
| | *7. Reexamine consultant/itinerant models (i.e., demonstration teaching within setting/technology* | | | |

## IEP FOR REGIONAL PROGRAM IMPROVEMENT

**Goal:** *Full continuum for service delivery to visually impaired students*

| Specific Objectives | Activities | Time Line | Resources Needed and How Obtained | Evaluation |
|---|---|---|---|---|
| | *8. Identify "support" services* | | | |

## IEP FOR REGIONAL PROGRAM IMPROVEMENT

**Goal:** *To develop a comprehensive program of professional growth and development for educators of visually handicapped children and youth*

| Specific Objectives | Activities | Time Line | Resources Needed and How Obtained | Evaluation |
|---|---|---|---|---|
| *To achieve a 50 percent increase in students enrolled in college programs for visually handicapped children and youth* | *1. Develop a brochure outlining professional opportunities in the education of visually handicapped persons*<br>*2. Develop public relations with liberal arts and junior college programs*<br>*3. Develop local recruitment plan which allows prospective teachers to leave local community for professional development and return to the area at the conclusion of the training*<br>*4. Develop professional growth program for teachers presently employed* | *1984-1985*<br>*2 years* | *Planning committee composed of representatives from each college program from within the region to ascertain innovative methods to approach the needs. Methods to include but not limited to: specialized curriculum for each college program, thereby eliminating duplicating effort; field based programs utilizing existing programs, and others* | *Increase by 50 percent students enrolled in college programs for visually handicapped persons* |
| *To improve formal system for communication and contact at state and regional levels* | *1. Forum for discussion and exchange of ideas on a regular basis among different serivce organizations and consumer groups involved with the visually impaired* | *February 1982* | *To establish state steering committee to include service organizations and consumer groups; representatives will be selected from groups* | *Publication of proceedings within time limits* |

**IEP FOR REGIONAL PROGRAM IMPROVEMENT**

**Goal:** *To develop a comprehensive program of professional growth and development for educators of visually handicapped children and youth*

| Specific Objectives | Activities | Time Line | Resources Needed and How Obtained | Evaluation |
|---|---|---|---|---|
| | *2. Develop directory of service continuum available within state and region* | *August 1982* | *AFB (regional)* | *Completion and distribution within time limits* |
| *To establish a regional political action plan* | *1. Identify existing organizations/operations* | *Present, done on-site* | *AEVH/SER*<br>*CEC*<br>*AFB*<br>*AAWB*<br>*SERC*<br>*ACB*<br>*NAPVI*<br>*NFB*<br>*Blinded Vetrans*<br>*AAIRCVH*<br>*CESR* | *List of resources* |
| | *2. Establish linkages between existing systems* | | | |
| | *- establish a steering committee with cross-representation (on state level)* | *Within 1 year* | *Each state* | *Minutes from meetings* |
| | *- utilize existing communication systems/networks* | | *Special network, newsletters, follow-up suggestions from steering committees* | |

## IEP FOR REGIONAL PROGRAM IMPROVEMENT

**Goal:** *To develop a comprehensive program of professional growth and development for educators of visually handicapped children and youth*

| Specific Objectives | Activities | Time Line | Resources Needed and How Obtained | Evaluation |
|---|---|---|---|---|
| | *3. Develop a position paper to address strategies for advocacy* | | | |
| | *- establish this as a priority within the "national network system"* | *On-site, national training meeting* | *Regional report to national, on-site national training meeting* | |
| | *- make position paper accessible within existing systems* | | | |
| | *4. Encourage individuals to work with any local services* | *Within 1 month* | *Training institute participants who return home and recruit one other individual to continue to work* | *Individual reports to other training institute participants* |
| | *- keep individuals informed of opportunities* | | | |

## IEP FOR REGIONAL PROGRAM IMPROVEMENT

**Goal:** *To establish methods for delivery of quality preservice and inservice training for meeting the needs of visually handicapped children*

| Specific Objectives | Activities | Time Line | Resources Needed and How Obtained | Evaluation |
|---|---|---|---|---|
| *1. Identify levels and kinds of training needs as reflected by the characteristics of visually handicapped children* | *1. Needs assessment of visually handicapped children*<br>*general → preservice*<br>*specific → inservice*<br>*2. Determine present level of competencies of personnel serving visually handicapped children*<br>*3. Determine discrepancies between 1 & 2*<br>*4. Look at strategies for addressing the discrepancies* | *May 1983* | *State/local agencies services as appropriate by state--with coordination from AFB*<br>*- use SSI needs assessment*<br>*- AFB collects data and summarizes* | *Compilation of needs data for region completed* |
| *2. Identify levels of expertise available to meeting training needs* | *1. Determine resources that will meet needs not currently met*<br>*2. Establish a talent bank within/across regions*<br>*3. Look at mechansim for moving resources where they are needed* | *May 1984* | *Same as 1; greater involvement of teacher training institutions* | *Completion of resource data for region completed and dissemination* |

## IEP FOR REGIONAL PROGRAM IMPROVEMENT

**Goal:** *To establish methods for delivery of quality preservice and inservice training for meeting the needs of visually handicapped children*

| Specific Objectives | Activities | Time Line | Resources Needed and How Obtained | Evaluation |
|---|---|---|---|---|
| | 4. Tap AFB for coordination of activities (housing at AFB) | | | |
| 3. Design program for meeting needs with the resources identified | 1. Do historical analysis of Southern Regional Educational Board and Western | October 1984 | Contact Abel and Ashcroft; AFB utilizes information and develops model | Compilation of model |
| | 2. Do historical analysis of Interstate Commission on Higher Education | | | |
| | 3. Develop model taking--best elements of SREB and WICAE | | | |
| 4. Implementation of model | a. Dependent on information gathered from above | | | |

# IEP FOR REGIONAL PROGRAM IMPROVEMENT

**Goal:** *Establish a networking system for organizations within the region*

| Specific Objectives | Activities | Time Line | Resources Needed and How Obtained | Evaluation |
|---|---|---|---|---|
| *1. To identify and share information on non-traditional funding sources* | | | | |
| *2. To share information and work cooperatively for service delivery systems*<br>*delivery system standards:*<br>*- preschool and/or infant*<br>*- rural*<br>*- multicultural*<br>*- changing role of residential school*<br>*- support and inservice for isolated teachers* | | | | |
| *3. Public relations and public education/consumer participation* | | | | |
| *4. Recruitment*<br>*- training (funding for out-of-state students)* | | | | |
| *5. Political action*<br>*- local*<br>*- state*<br>*- federal* | | | | |

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| 6. *Research/innovative programs/data*<br>7. *Data* | | | | |

## IEP FOR REGIONAL PROGRAM IMPROVEMENT

**Goal:** *Vehicle/system to share*

| Specific Objectives | Activities | Time Line | Resources Needed and How Obtained | | Evaluation |
|---|---|---|---|---|---|
| *1. Information/resources*<br>*- alternatives of program standards*<br>*2. Develop program standards to insure quality services to visually handicapped children*<br>*3. Increase the effectiveness of identification/assessment prodecures, standards, and instruments*<br>*4. Develop alternative models for preservice and inservice training* | *Develop a regular regional Newseltter*<br>*Contents:*<br>*- each might have an individual theme*<br>*- openings/job opportunities*<br>*- scholarships, grants, and funding*<br>*- summer institutes/seminars/conventions*<br>*- long-term calander of regional activities*<br>*- summer programs for kids (e.g., summer camps, vocational programs, etc.)*<br>*- bulletin board*<br>*- report from each organization*<br>*- letters to the editor/commentary* | | *CAOMS (North)*<br>*CAOMS (South)*<br>*AEVH*<br>*NFB-Sharon*<br>*Bob*<br>*ABC*<br>*AAWB*<br>*NAPVI-CA*<br>*AZ*<br>*Natl.*<br>*CTEVH*<br>*CAPS*<br>*WAVI*<br>*JAC* | *Pete*<br>*Kent W.*<br>*Jack*<br>*Jack*<br>*Rose*<br>*Jack*<br>*Pete*<br>*Shirley*<br>*Noel, Rose*<br>*Bess*<br>*Rose*<br>*Margo*<br>*Roy*<br>*Jack* | |

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| Specific Objectives | Activities | Time Line | Resources Needed and How Obtained | Evaluation |
|---|---|---|---|---|
| | *Mail out notes - Jack* | *April 1* | | |
| | *Contact organizations -* | *March 15* | | |
| | *Contact Fred S. - Jack* | *February 23* | | |
| | *Develop flyer - Don & Jack* | *March 15* | | |
| | *Submit form - Don & Jack* | *March 15* | | |
| | *Duplication by AFB - Eileen? Jack will call* | *February 23* | | |
| | *Check to see if AFB can send first newseltter - Jack* | *February 23* | | |
| | *First edition mailed - Fred/Aiken, CDHS* | *May 15* | | |
| | *Articles-copy due to Fred - organization contacts* | *April 15* | | |